#13

ADVERTISING

Big picture

As a large corporation with a branded identity, all advertising efforts must be coordinated between the Community Relations Director, the Regional Director of Sales & Marketing, and the Seattle office. All advertising is designed by our in-house graphic designer and Marketing Director in our Seattle office. In addition to numerous stock advertisements available for you to pick from, the Seattle team will also work with you if you need a specific ad designed.

No ads are to be created at the community level.

Additionally, if you need to get information out quickly, you will find a number of flyer templates on the E&Me library that can be customized by you. These flyers cover numerous types of events and activities and can be printed

Our Expectations

You will work with your Executive Director and Regional Director of Sales & Marketing to strategically decide where, when and how often you will advertise in order to achieve the best return on your investment. Your budget does contain an allotted amount of money for advertising and it is expected that you will work within that budget.

Our Procedures

Once you have decided the location, date and frequency of your intended ad, you will need to decide what ad you would like to use. The advertising section of the library on E&Me contains several ad templates that can be customized to your community.

After you select your ad, you will need to fill out a Media Insertion Order Form. You will forward that to your Executive Director and Regional Director of Sales & Marketing. Once they approve it, they will then forward it to R4 Printing who will be responsible for placing the ad.

Additional Information:

- Please contact your Regional Director of Sales and Marketing
- Check out these links on E&Me:
    - Advertising Forms and Emeritus Logos
    - Advertising Guide
    - Media Insertion Order Form
    - Model Permission and Release Form

EXHIBIT 133
DEPONENT Loucki
DATE: 10 / 7 /2011
C. KYLE, CSR No. 7014

AD/MP 01

PUBLIC RELATIONS

Big Picture

A big part of your job as the Community Relations Director involves time spent working on Public Relations (PR). Public Relations refers to those activities that involve name-recognition, free media exposure, and welcoming community groups into your community.

Our Expectations

It is expected that you will host 1 community group event in your community each month. Community group events can consist of:

- Networking meetings for professionals
- Support groups
- Clubs or civic organizations
- Benefit or charitable events

In addition, we expect you to send out press releases to all print and digital media to promote name recognition and awareness of our Emeritus product. While we do not mandate a certain number of press releases per month, you should be sending these out on a consistent and regular basis. Some topics for press releases would include:

- Resident participation at special events (in your building or in the larger community). Example – Children coming to your community to be greeted and/or gifted by Santa and your residents, or residents participating at the annual city-wide Senior Olympics.
- Name changes or change in ownership for communities that are newly acquired
- Visits to your community by local, state or federal dignitaries
- Announcements of upcoming community events that are being held at your community

Our Procedures: Hosting Community Groups

The first step in hosting a community group in your building is finding a group that is in need of meeting space. Check with all networking groups that you are a member of – generally they rotate where their meetings will be held and their calendar is often planned out a year in advance. Ask to be put on the calendar and offer your community as a back-up in case another meeting space doesn't work out at the last minute.

Create a list of local support groups and where they meet. Schedule an appointment with the leader of the group and find out what their needs are. Do they need a room for meetings? If not, is there a spin-off support group that they have been considering that they might need space for? Even better, suggest hosting a support group to an agency that doesn't currently offer that service. You provide the space and they provide the

speaker.

Talk to clubs and civic organizations like your local Chamber of Commerce. Most Chambers offer several different types of meetings each month and they are usually held at the businesses of their members. Ask to be put on the list for the monthly lunch meeting, breakfast meeting and/or business after-hours.

Does your community have a high population of Italian residents? Talk with the local Italian-American Club and see if they would like to have a dinner or meeting at your community. Be creative and see what groups have the most in common with your current residents. Those are the groups that are most likely to provide you with new leads.

Finally, check with charitable organizations and offer your community as a site for fundraisers or benefit events. Even if you only have a small space to offer, suggest a gourmet dinner for their large donors – prepared by your Emeritus chef. Charitable organizations that are great to check with are the Alzheimer's Association, local arts councils, Kiwanis, Rotary, American Red Cross, etc.

If you find that you are struggling to come up with an idea for a community event, check out the GPGR, (Great People, Great Relationships) links on the E&Me library under "Sales and Marketing". This tool provides you with ideas for every month of the year.

Our Procedures: Sending Press Releases

There are a couple of rules of thumb that you need to be aware of when working with the media.

1. **Accuracy** – Make sure that your press releases are grammatically correct, contain accurate contact information for you, and are sent to the right people.
2. **Timeliness** – Press releases announcing an upcoming event need to be sent out very early. We recommend sending them in intervals leading up to the actual event. Send one at 5 weeks, one at 3 weeks, one at 1 week and then a Reminder Press Release the day before your event.
3. **Succinct** – Your initial paragraph needs to answer the "who, what, why, where, when and how" of what your are writing about. Follow the proper format for press releases (there are press release templates in the E&Me library).

For detailed information about how to write a press release, check out "How-To: A Media & Public Relations Guide" on E&Me.

For Additional Information:

- Please contact your Regional Director of Sales and Marketing

Check out these links on E&Me:

- How-To: A Media & Public Relations Guide
- PSA's & How to Use Them
- Support Group Public Announcement Template
- GPGR link under Sales & Marketing

AD/MP 03

YELLOW PAGES

Policy

Emeritus partners with our national vendor, Ketchum Directory Advertising, to order and post yellow page ads for your community. Follow the procedure below to approve your communities' yellow page artwork and to view your communities' media plans.

Procedure

Click here for step by step procedures on how to access the Ketchum extranet site and approve the yellow pages artwork for your community

Click here to review Frequently Asked /Questions about the Ketchum extranet site.

Click the following address to access the Ketchum site directly http://knet.kda.com/

Click here to view the recorded Ketchum Yellow Page Extranet Training. Click here to install the Flash player if it is not already installed.

#13

Emeritus marketing philosophies

At Emeritus, we believe that the best and most satisfying way to market our communities is by building personal relationships with the people we work and interact with in the greater community.

From this core belief, we've developed the **Great Relationships** and **Royal Treatment** programs that teach our employees specific relationship building skills.

Below is a quick overview of each of these programs.

Great Relationships Program

The Great Relationships program is based on the belief that the best way to "sell" your community is by building positive personal relationships with individuals in your greater community.

For example, using the Great Relationships philosophy, you would learn as much as possible about the discharge planner at your local hospital including specific hobbies she has, what her favorite color is, and whether she has children or pets, etc. As your relationship grows, you might ask her how her child is doing, or bring by a small gift such as a book for her child or a special treat for her pet. Over time, you will build a strong personal relationship that is satisfying to both of you, and she'll feel comfortable and happy about referring potential residents to your community.

Royal Treatment

At Emeritus when we talk about giving someone the "royal treatment" we mean going the extra mile to show that person we are thinking of them and we really care about their well being. For example, when residents move into your community, you could give them a dose of royal treatment by . . .

- hanging a banner welcoming them at your front door,
- fixing their favorite food for dinner, and
- hosting an open house welcoming them to your community.

Providing the royal treatment to those you interact with strengthens the bonds of your relationship and ultimately leads to increased referrals to your community and an increase in customer satisfaction.

For additional information on how to receive specific training in these programs, talk with your executive director.

EMERITUS Senior Living

ADVERTISING INSERTION ORDER

Instructions for Ordering and Placing Advertising Templates:

1. Determine Ad Specs and Cost
2. Select Desired Template
3. Obtain Regional Director Approval (either RDO or RDSM depending on your division)
4. Send Insertion Order to corpmarketing@emeritus.com to receive tracking phone number and to set-up a source code in YGL
5. Place order

For questions regarding the advertising process please contact the Seattle Marketing Department at corpmarketing@emeritus.com or 1-800-429-4828

Order Date: ____________ Name: ____________

Region/Community: ____________ Phone: ____________

Publication: ____________ Ad Rep: ____________

Special Section (if any): ____________ Phone: ____________

Email for artwork: ____________ Fax: ____________

Ad Due Date: ____________ Email: ____________

Ad Title/Template: ____________

Ad Insertion Date(s): ____________

Ad END Date: ____________ Color: ☐ B/W ☐ Full Color

Ad Cost: ____________ Size: W: ____ H: ____

Additional Comments: ____________

Tracking # & Source *(set up by Seattle Marketing)*

Unique Tracking Number: ____________

Source – set up in YGL: ____________

Approve by: ____________ Date: ____________

Email to CorpMarketing@emeritus.com. Here are two ways to send it.

1. Save a copy and attached to an email - or -
2. Go to your menu – File – Send To – Mail Recipient This will embed the above form into an email.

AD/MP 07

EMERITUS
Senior Living

ADVERTISING INSERTION ORDER

Instructions for Ordering and Placing Advertising Templates:

1. Determine Ad Specs and Cost
2. Select Desired Template
3. Obtain Vice President of Sales & Marketing Approval (either VPSM or VPO depending on your division)
4. Send Insertion Order to corpmarketing@emeritus.com to receive tracking phone number and to set-up a source code in YGL
5. Place order

Note: Please allow 72 hours to process. Allow additional time to create ad in-house.

For questions regarding the advertising process please contact the Seattle Marketing Department at corpmarketing@emeritus.com or 1-800-429-4828

Order Date: ______________________ Name: ______________________

Region/Community: ______________________ Phone: ______________________

Publication: ______________________ Ad Rep: ______________________

Special Section (if any): ______________________ Phone: ______________________

Email for artwork: ______________________ Fax: ______________________

Ad Due Date: ______________________ Email: ______________________

Ad Title/Template: ______________________

Ad Insertion Date(s): ______________________

Ad END Date: ______________________ Color: ☐ B/W ☐ Full Color

Ad Cost: ______________________ Size in inches: W: ______ H: ______

Additional Comments: ______________________

Tracking # & Source *(set up by Seattle Marketing)*

Unique Tracking Number: ______________________

Source – set up in YGL: ______________________

Approve by: ______________________ Date: ______________________

nail to CorpMarketing. Here are two ways to send it.

AD/MP 08

1. Save a copy and attached to an email - or -
2. Go to your menu – File – Send To – Mail Recipient This will embed the above form into an email.

Insertion Order Number: ______________

EMERITUS ASSISTED LIVING

INSERTION ORDER

Send Invoices To:	Send Tearsheets To:	Classification
		☐ Lifestyle ☐ Senior Section ☐ Main ☐ Other:

Newspaper Contact:

Run Date(s):

Ad Start Date	# of Time(s) to Run	Column x Depth	Net Rate	Amount

MEDIA INSTRUCTIONS

Ad Copy

Ad Title	Ad Size	Color
Line Screen	Ad Rate/Column Inch	Materials Deadline

Send Materials To (Publication Shipping Address):

____

____

____

____

____

The INSERTION ORDER NUMBER must appear on the invoice for payment. It is located in the upper left hand corner. Please send all invoices to the address listed above.

Please call ____________________ at ______________ if you have any questions concerning this order.

Sign and return fax to confirm receipt, rates, run date(s) and contact information to ____________________________ Attn: ________________________

Signature ____________________________ Date ______________

AD/MP 09

PERMISSION AND RELEASE

EMERITUS
Senior Living

For good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, I hereby give to and grant Emeritus Corporation their assigns, agents, licensees, clients and principals, representatives, respective heirs, successors and assigns, the absolute right and permission in perpetuity to copyright, use, exhibit, display, print and publish, as advertising whether in print, electronic format or featured on Emeritus Corporation's web site, other media, or for any other lawful purposes, all photographs, photographic negatives, motion pictures films and/or magnetic video tapes, magnetic audio tapes, prints of every kind and nature, and all illustrations, pictures, designs, paintings, testimonials, comments and drawings of every kind and nature, (hereinafter and collectively, "Works"), Wherein

________________________________appeared and/or posed or acted as a model exclusively for Emeritus Corporation and any reproduction thereof, and made through any media; all without inspection, consent or approval by me of the finished product or of the use to which it may be applied, (hereinafter, and collectively "My Image").

I further hereby give and grant to Emeritus Corporation the sole and complete ownership of all rights I may have in the Works which feature or contain My Image, together will all associated copyrights and other intellectual property rights (including rights of registration and renewal and derivative work rights). To the extent that I may have some ownership rights in said works, I hereby assign, sell and transfer those rights to Emeritus Corporation. I hereby release Emeritus Corporation from any and all claims and demands arising out of or in connection with their use of My Image.

I understand that I will not receive any monetary compensation from Emeritus Corporation for the rights granted under this Permission and Release.

I have the legal right to provide the grants and releases set forth herein.

____
Printed Name of Image/Model

____
Signature of Image/Model

____
Title (e.g. resident, employee, etc):

____
Location

____
Date

Witness (reviewed and approved by):

____
Printed Name of Witness

____
Signature of Witness

____
Title

____
Date

For Seattle Office Use Only:
Insert identifying photograph of Image/Model

PSA's

OBJECTIVES & TARGET AUDIENCE

1. What is the purpose of the Public Service Announcement?
2. Who is the target audience and why?
3. What is the single most important message you want the viewer to remember?
4. What do you want the viewer to learn and do as a result of hearing, reading or watching the PSA?

The 'Heard' Word is Different than the 'Read' Word: Writing Radio PSA's

The public service announcement (PSA) is a cousin of the press release. Local radio and television stations provide these free announcements as an ongoing community service and they are required by law to devote time to PSA's They are sort of like an electronic bulletin board. People often forget to take advantage of this accessible outlet for spreading the word about new services, products or developments. It's an especially appropriate platform for community events, non-profit group activities and medical discoveries.

The radio station is a good place to start as it is easier and cheaper to prepare a radio PSA than it is to prepare one for television. That doesn't mean that a radio PSA doesn't require special guidelines and a different style than print announcements. It's just that no expensive and complex visuals are required as they are in TV.

In preparing a PSA for radio, many writers forget the 'heard word' is different from the 'read word.' If you listen to radio ads and announcements, you'll notice a different style. Instead of the usual who, what, when and where, radio blurbs or 'spots' usually begin right with the 'what' and end with the 'where' and 'when,' especially if announcing an event or an opening. The 'how' is included within the main message, primarily to tell 'how' to get there or 'how' to get help, make a donation or acquire the product. People tend to remember and best retain the last thing they hear, so this is emphasized on the radio. That's why the main message is repeated again and again at the end of the announcement.

Keep in mind when writing your PSA that the 'heard' word must be clear and concise. Short and simple sentences are best retained. Close your PSA with what you want your listening audience to remember. Repeat, repeat and end your PSA with a bang.

Public Service Announcement

For Immediate Release
<Date>

Contact: <name>
<Title>
<Phone>

Support Group For Anyone Suffering from Memory Loss

If you or someone you know is caring for a loved one with memory loss, there is a support group in your neighborhood. <Community Name>, is hosting a gathering of care professionals to support the families of memory loss challenged loved ones. The group will discuss how to deal with the huge range of emotions displayed by those suffering form Alzheimer disease and Dementia, along with other topics of interest.

Support groups will be meeting <day of the week> at <community name> assisted living beginning at <time>.

Please join us at <community name> Assisted Living Community to meet new friends and have healthy discussions. Bring your questions and find better ways to cope with your day-to-day challenges. Everyone one is welcome. Call <phone>.

<Add whatever details about the program you want but try to keep the whole announcement to 30 seconds. > Stop by <address> or call <phone>.

ADVERTISING GUIDELINES

EMERITUS

ASSISTED LIVING

The start of something wonderful.®

Checklist for Placing Print Ads

- ☐ Create a media plan & fax to RDSM
- ☐ Contact newspaper sales rep regarding placing ads and negotiating rate
- ☐ Pick an ad from the approved Emeritus ads
- ☐ Edit ads to reflect appropriate community information, ensure Fair Housing representation
- ☐ Order ad from R-4 (camera ready art)
- ☐ Proof ad
- ☐ Send to newspaper, include your **Insertion Order Form**
- ☐ Keep copy of tearsheet attached to your media plan, keep in binder

Glossary

Camera Ready Art (CRA)

Art that is ready to be scanned or photographed for printing. Also sometimes referred to as a PMT, RC or Velox. Ad would come on a glossy white stock. Some publications will request ad artwork to be Camera Ready.

Contract Proof

A color proof made from the film negatives. Normally only used in 4-color process printing, for most publications a color laser proof is sufficient and is a lot cheaper. (Ask your sales rep if you can provide a color laser proof.)

4-color Process

The process of printing full color ads (color photographs). Sometimes referred to as CMYK (Cyan, Magenta, Yellow, Black). Publications will require color ads to be submitted in negative form (each color requires it own negative) or saved to a computer disk.

Column Inch

Newspapers and magazines can have different sizes for a Column Inch. Generally, we do 3 column inches and it's 6 7/16" for most newspapers. Be sure to verify the column inch with your sales rep.

Film Negative

An acetate-based film containing the ad image in which the values of the original ad are reversed, dark areas appear light and visa versa, but still read correctly. Some publications will request ads in negative form.

Laser proof

An ad proof that is run from a laser printer onto paper.

Line Screen

A number that indicates the resolution of the screened areas of the ad. The greater the number value of the line screen, higher the resolution. Each publication may request a specific "line screen" the ads should be produced at. Newsprint ads typically run at an 85-100 line screen.

Mojo

An internal guiding rhythm or groove.

Short Run Rate

A short run rate is a fee that the paper charges you for cancelling planned advertising.

Target Audience

The customer that we are specifically trying to reach.

Media Planning

Media plans are required for all communities. Once you have completed your **Media Plan Form,** please send it to your RDSM for approval and then fax a copy to Missy Day in the Seattle Marketing Office, at (206) 301-4080. You will find an example & blank form in the FORMS section.

Local Market Media Assessment

The following is a series of questions, information requirements and evaluative criteria that should be considered whenever a media opportunity is being discussed. This section offers insight into how print advertising should be assessed and planned.

5 Things to Remember When Evaluating Media Placement

1) What is the target audience that you want to reach & are you able to reach it using this medium?
2) What is the circulation of the newspaper/magazine? (How many people in our target audience are actually reading the newspaper/magazine?)
3) Be sure to negotiate the rate with the newspaper, if you show them your 6 month media plan, you may be able to negotiate a better rate. If you cancel planned advertising with a newspaper, be aware that you will be charged a "short run rate". A short run rate is a fee that the paper charges you for cancelling planned advertising.
4) What is the deadline that all artwork must be submitted to the publication?
5) Will this require new layout, design or copy? If so, you must allow at least 2 full weeks for new creative production.

Planning Media Placement

- Submit ads to publication with an **Insertion Order Form**, you will find an example & blank form in the FORMS section
- Run one ad 3-5 times and then rotate
- Keep in mind at all times the ethnic composition of your area to ensure proper representation

Insertion of Ad

When placing ads in a newspaper or magazine you will need to either provide a completed **Insertion Order Form** with the finished ad or provide a completed Insertion Order Form to R-4 and they will send the ad to the appropriate publication.

Fair Housing - Mandatory

All Sales and Marketing materials must comply with The Fair Housing Act, this includes: print ads, direct mail, flyers, collaterals, etc.

How to Ensure Compliance

RED HOT!

- **Media Plans** must include the diversity composition in each market place
- Any minority group that comprises 4% or more of the market's total population must be reflected in the media plan
- Plan the entire calendar year at once to ensure the proper number of diversity ads appear before year's end

For example: if the community's diversity composition is the following:

- 71% White,
- 8.4% Black,
- 3.5% Asian and
- 30% Hispanic

Then 8-9% of the community's ads must feature Black or African-American photo subjects and 30% of the ads must feature photo subjects that are Hispanic.
In other words, if you know you're going to run 25 ads during the year:

- 8 need to show photo subjects that are Hispanic,
- 2 need to show photo subjects that are African-American
- Have your RDSM sign off on your Media Plan
- Fax a copy of your media plan to Katharine Conroy, (206) 301-4080.

All Sales and Marketing materials must comply with The Fair Housing Act, this includes: print ads, direct mail, flyers, collaterals, etc.

The Fair Housing Act requires that all Sales and Marketing materials have either the Equal Housing Opportunity Logo or Slogan:

Logo:

EQUAL HOUSING OPPORTUNITY

Slogan:

We comply with the fair housing act.

Newspaper Advertising

Local newspapers are the most frequently used vehicle to promote Assisted Living (AL) and Retirment Living (RL).

Recommendations

- The frequency of advertising will depend on the community's occupancy status (or development phase in the case of new communities)
- Frequency will also depend on the newspaper – daily, weekly, monthly, or quarterly
- Due to varying qualities of print resolution and conservation of cost, we recommend black and white ads. (4 color ads cost significantly more than black and white, because it requires 4 films, therefore we recommend black and white ads)
- Ad sizes will vary depending on which ad campaign is selected, but will generally not exceed 30" column inches in size or (11" wide by 6" deep)
- Larger ads may be necessary in markets where significant image/awareness problems exist or when announcing milestones in a community's development such as a grand opening

Where to Place the Ads

- Newspaper ads should be placed in the "lifestyle" section
- If such a section does not exist, use "local" or "main"
- Special editorial sections focusing on issues related to senior living or senior care

Magazine Advertising

- New Lifestyles or Senior Guide will often be included in plans for both RL and AL as they specifically "speak" to one who is shopping for senior housing. Directories are generally published on a bi-annual basis.

- Regional/Area communities should co-op ads.

- Tabloid newspapers with senior-focused editorial are also often recommended as part of a media plan. This is especially true for communities that promote retirement living, whose primary target market is seniors 70 years of age and older. Such newspapers are generally issued on a monthly basis.

Ordering Ads

- Fill out the R-4 Printing **"Emeritus Ad/Flyer Request Form"** completely, you will find an example & blank form in the FORMS section
- Fax the form to R-4 at (253) 572-4080. Indicate directly on the ad any copy or editing changes that need to be incorporated
- Indicate on the form the photo you have selected for the ad
- Upon receipt of your request, R-4 will fax a confirmation within 24 hours
- You will receive a draft of your ad for review and approval. Please remember that any changes may take a minimum of 24 hours
- Initial the approved ad proof and return via fax. Ads can be sent directly to the specified publications or vendors

Important Note

Please send all materials (ad request form, copy changes to ad and completed Insertion Order Form) at one time. Your order can not be completed unless all materials are submitted together. If you have any questions or special requests, contact Deanna at R-4 Printing, at (253) 627-1831.

Cost For Ad Production

Ad Output (3 col x 5 up to 3 col x 8; 4 col x 6 up to 5 col x 9 black & white)

Existing ad master with minor changes (logo, community name & address)

- $38.40* – Output to Camera Ready Art
- $64.50 – E-mail ad to publication / provide art on zip disk**
- *Each additional copy change after 1st proof: $22.80*

Existing ad with community changes already made (re-order)

- $14.00* – Output to Camera Ready Art
- $64.50 – E-mail ad to publication / provide art on zip disk**

Existing ad master with all new copy (copy provided by RDSM/Community)

- $51.20* – Output to Camera Ready Art
- $64.50 – E-mail ad to publication / provide art on zip disk**
- *Each additional copy change after 1st proof: $22.80*

Existing ad master with all new copy (provided) & layout, including scanning in artwork

- $67.20* – Output to Camera Ready Art
- $64.50 – E-mail ad to publication / provide art on zip disk**
- *Each additional copy change after 1st proof: $22.80*

* **Pricing does not include shipping costs and prices are subject to change.**
** **Zip disk $30.00**

* If your ad order is outside of the above sizes or in color, or your have a special request, please call Deanna at R-4 Printing, at (253) 627-1831.

Ordering Flyers

- Fill out the R-4 **Emeritus Ad/Flyer Request Form** completely, you will find an example & blank form in the FORMS section
- Fax the request form to R-4 at (253) 572-4080. Indicate directly on the flyer any copy or editing changes that need to be incorporated
- Make sure you indicate how many copies of the flyer you want printed
- Upon receipt of your request, R-4 will fax a confirmation within 24 hours
- You will receive a draft of your flyer for review and approval. Please remember that any changes may take a minimum of 24 hours
- Initial the approved flyer and return via fax

Cost For Flyer Production

Please call Deanna at R-4 Printing, (253) 627-1831, for pricing information. Make sure you specify quantity and shipping preferences (overnight, standard, UPS, ground, etc.)

Direct Mail

Due to recent research and findings we will no longer recommend targeting AL to the adult child and senior. We will be targeting the referral source because of the following:

Findings

- The adult child is either insulted, thinking that they are too young for AL,
- They are not aware that it is to educate them for the needs of their parent, or
- They sort "junk" mail over their trash
- AL also tends to be a crisis driven need and
- Direct mail does not build enough awareness for either the senior or the adult child

AL direct mail will now target referral sources. The geographic radius will vary depending on the size of the market but will generally fall between 15 and 25 miles of the community's location. Referral lists will come from local hospitals, chambers and our direct mail company.

Recommendations

Direct mail is historically the most effective lead-generating mechanism for RL communities. AL direct mail is effective if targeted toward referral sources. Direct mail is recommended for all communities with occupancies of less than 90%, for the following reasons:

- Direct mail can provide almost complete coverage of prospects that fall within specific age, income, and demographic criteria for the AL or RL target market
- Because direct mail can be so precisely targeted, there is a very low "waste" coverage
- Direct mail is highly efficient on a cost per lead basis
- Direct mail provides a very strong call to action, especially when incorporating a Business Reply Card (BRC).

Mailing Lists

- Since the primary target group for RL is the senior resident prospect, RL mailing lists will target those aged 70+, generally with incomes of at least $20,000 annually in a geographic radius not exceeding 20 miles.

- Direct mail to the prospect list may be recommended 2-4 times per year (May or June, August/September or October). The timing of direct mail drops often coincide with those periods when the heaviest lead flow takes place – spring and fall. If the lead base is minimal and occupancy critically low, an additional drop in the summer may be advised.

- Handling a list larger than 10,000 can be unmanageable for a community's marketing staff. Should a larger list be necessary, it is advised that the mailing drop is staggered over a month.

To Order

Call Missy Day at (206) 301-4082.

Radio

Building a consistent brand at the local, state and regional levels includes the use of radio. This section details Emeritus' available radio spots developed for your use.

While newspaper and direct mail are better at providing detailed information to a broad local audience, *radio is a terrific support medium. When utilized in tandem with print advertising and direct mail, radio often contributes to a significantly higher lead flow than generated by ads and or direct mail alone.*

Benefits of Radio

- Immediacy. Radio airtime can be reserved – and spots or scripts provided to selected stations – close to the time of broadcast
- Radio is a local medium. Through formats and time period positions it can zero-in on a community's AL or RL target audience with limited waste
- Radio is an intrusive medium: its listeners are a captive audience to an advertiser's message
- Radio is efficient in terms of the cost-per-thousand persons reached

Recommendations

- Because radio ads are often ignored by listeners, spots must be well-produced to capture the listener's attention. The most effective radio advertising utilizes actor-dialogue formats, rather than the more simple (though less expensive) "announcer-read" formats.

- The frequency of radio use will depend on how significant the community's occupancy challenges are and the cost of using radio in the market. For communities located in suburbs that are within the broadcast range of a large metro area, radio may be cost prohibitive unless a significant number of prospects are being drawn from that metro area.

- Radio time is purchased in units called Gross Rating Points (or GRPs). For AL, look at the 45-64 age group, and for RL look at the 65+ age group.

- Once a radio budget is approved by your RDSM and on the media plan and the spots are ready to air, negotiate rates and provide a specific placement schedule, about one- to two-weeks prior to airtime. This Radio Schedule will indicate precisely which stations and air times are recommended.

To Order

Call Missy Day at (206) 301-4082.

Public Relations
~A How To Guide~

Building and maintaining Emeritus' reputation as a quality provider of senior care and housing plays a vital role in our ability to attract new families and seniors to our communities, as well as retain current ones. As employees of a high-caliber organization like Emeritus, we are all aware and quite proud of the outstanding programs and care that we offer to our residents every day; and it is essential that we communicate that quality to the general public on an ongoing basis.

EMERITUS
Senior Living

Created by the Seattle Marketing & Communications Department
For more information, please contact CorpMarketing@emeritus.com or 1.800.429.4828

Table of Contents

AD/MP 24

Dear Community Relations Director:

Building and maintaining Emeritus' reputation as a quality provider of senior care and housing plays a vital role in our ability to attract new families and seniors to our communities, as well as retain current ones. As employees of a high-caliber organization like Emeritus, we are all aware and quite proud of the outstanding programs and care that we offer to our residents every day; and it is essential that we communicate that quality to the general public on an ongoing basis.

Unfortunately, the type of publicity that we typically see about senior care more often than not is negative in nature. For those of us who have dedicated ourselves to educating and making a difference in the lives of seniors and families, this can be very disheartening because we know there are so many positive stories to tell. Therefore, we must make it our responsibility to keep the media and the public informed about the positive impact that high quality senior care can have on seniors and the well rounded experiences they receive that help contribute to their overall lifestyle care.

While this sounds like a monumental task, the truth of the matter is that you and your staff already are doing the hard part: providing quality programs and service. The challenge is how to let the news media know about the great things you are doing in your communities and establish an ongoing relationship to help tell those positive stories. By doing this, we also are better able to minimize the amount of negative publicity that can occur.

This guidebook has been created to help you do just that. There are media relation's resources available to you at the Seattle Office whose primary function is to help facilitate positive media exposure for your community. This guidebook is designed to help you:

1. Increase your awareness of the types of things you are doing in your community that can be publicized and how to go about getting them publicized; and
2. Keep you mindful of the types of negative things the media tend to focus on and the particular times throughout the year their interest in negative stories regarding senior care can be heightened.

I am proud of your accomplishments and your dedication to seniors. Now, let's tell the world!

Sincerely,

Jayne Sallerson
Vice President of Marketing & Communications

AD/MP 25

WHY IS PUBLIC RELATIONS IMPORTANT TO OUR INDUSTRY?

Media and public relations are essential for practically every aspect of our business success. First of all, it establishes our existence. Do you truly exist if people do not know that you do? The answer is, probably not for long.

Certainly purchasing advertisement has traditionally been the basic way to market a company or its services. But as the cost of advertising has increased dramatically, savvy businesses have turned toward media and public relations as the method of getting their message across and creating familiarity and name recognition. It's cheap (or free) and far more effective, both immediately and long term, than generic advertising.

Secondly, it helps to educate the public. Because assisted living is still a relatively newer concept, confusion remains as to how it differs from nursing homes. Using the media and getting involved in the community at large are ways to directly or indirectly educate the public.

Third, seeing you in the newspaper or involved in local activities regularly shows you are vital, interesting and caring about what is going on in your world. It increases your credibility in that it shows you 'walking the walk', and often offers testimonials of your positive contributions to the life of your residents, families, staff and greater community.

So, in summary, using media and public relations are the most cost effective methods to become well known, spread your message and mission and create a positive image of community involvement and concern. All of this will translate into increased business to your door, as well as increased desirability as a workplace.

Do you need to be a PR professional to pull this off? No. You just need to follow the basic procedures highlighted in this guide.

AD/MP 26

CHECKLIST FOR PUBLIC RELATIONS STRATEGIES

- € Begin with a Media Plan
- € Recognize a Story
- € Create a Story
- € Develop Relationships with the Press
- € Get Involved
- € Be a Positive Impact

AD/MP 27

WHAT IS PUBLIC RELATIONS?

Any activity that promotes a positive image fosters goodwill or increases sales.

The Four Main Aspects of Public Relations

- Crisis Communication
- Media Relations and Publicity
- Special Event Planning
- Public Interest and Image Building

Public Relations Campaign Goal

Clearly articulate key messages and garner positive press coverage - consistently.

AD/MP 28

HOW TO DEVELOP A STRONG PUBLIC RELATIONS PLAN

One person should be selected as the public relations "spokesperson." This will eliminate confusion around who should talk to the press and all messages to the public will have the same tone and feel.

Five Steps to Developing a Public Relations Plan

1. Identify the Media
2. Recognize a Story
3. Prepare Your Story
4. Contact the Media
5. Meet the Media

1. Identify the Media:

Create a list of all the newspapers, radio & TV stations in your area. To get you started, go to the E&ME (Emeritus Employee Intranet) Library under Sales & Marketing/Media Lists to find a list of all media outlets in your city. Get to know the news directors and editors for each media. Know the news deadline for each media; you'll want to hold your event/meeting well before the deadline. It's important that you avoid calling your media contacts just prior to their deadline. Many printed publications develop an editorial calendar, try to obtain their calendar and plan your events/ meetings around the topics they are covering.

An editorial calendar is a publication's schedule of upcoming article topics and special-issue focuses. This relative certainty of upcoming coverage is the key: instead of having to persuade a skeptical reporter to cover your market, you know he or she is working on a particular story. You can then fit your message into that story topic, which makes your input a welcome addition to what the reporter is at that moment working on. Instead of being in an adversarial posture with a reporter, you are in fact helping a very busy person do his or her job.

AD/MP 29

2. Recognize a Story:

Pay close attention to the stories being covered by your local media, this will help you gain an awareness of what makes a story newsworthy. What are the audience, circulation, ad rate and mission of the publication? With this information, you can decide if it's a publication that reaches your market, gauge the likely appeal of your message, and the value and reach of coverage in that publication. Pick only those publications that will have the highest impact for your marketing objectives. What is the date of the issue you're targeting? When coverage will appear in print lets you decide if that timing is appropriate for you.

What is the lead time for this story?

This is critical: it tells you when reporters will begin their work on the story, and, therefore, when you want to initiate contact to be included in this specific story.

What type of story is it going to be?

The specific story angle chosen by the editor or reporter can be highly varied, and will directly influence both your chances for coverage and the kind of information you should provide to the reporter. Sometimes publications run round-up stories that briefly cover all possible related companies, while other times they may seek just a few examples to illustrate their point in depth, or simply publish a listing of the products or companies in a given category with very little in the way of editorial.

What information does the reporter or editor need?

Given the type of story and topic, what are the practical information needs of the journalist? Getting them what they want, when they need it, and in the form in which it's easiest for them to use (fax, e-mail, photos, press releases, a table, etc.) is a key starting point in successful contact.

Tailor a Proposed Story for Each Opportunity

Prepared with the knowledge on each story and publication, you can choose a story angle to suggest to the reporter doing the story, or at least a strong reason your message should be included. Review the publication's audience and editorial style, ideally by reviewing the publication itself. Finally, outline your proposed story angle on paper to remind you of 1-3 key points that will be compelling and informative for readers and, therefore, to the reporter.

AD/MP 30

There are two different news categories: hard-breaking stories and soft human interest/feature stories.

Examples:

Hard

- Grand Opening
- Expansion
- New Hires
- Fire/Accident
- Seminars at Community

Soft

- 100th Birthday
- Special Anniversary for Resident
- Celebrity Resident
- Resident Awards
- Customer Service Award to Staff

FIVE STEPS TO DEVELOPING PUBLIC RELATIONS PLAN CONT.

Prepare your Story
There is a standard format for developing press releases. See examples in the Forms Section.

The Most Important Part of the Press Release is the Lead Paragraph
Be sure to use the 5 "W's" (who, what, where, when, and why -sometimes how). Languages are plain, everyday English.

Avoid Using Industry Terms Which May Not be Commonly Known – Avoid Jargon
Even when submitting information to the trade publications, you should not become overly technical in your language.

The Most Important Information Should Always be at the Beginning of the Story – This is Known as the "Lead"
This will ensure that the information you're trying to convey will get printed if the editors need to cut your copy because of space limitations.

Stories Should be Typed 12 point and Double-Spaced on one Side of a 8 ½" x 11" Paper
Use community stationery for the first page. Top left margin insert the words FOR IMMEDIATE RELEASE followed by a colon.

On the right side of the page, insert the word CONTACT followed by a colon. Then identify the person in your community who's responsible for answering questions and providing additional information to the media. That might be you, your ED, RDSM, RDO, VPSM or VPO, depending on the topic of the press release. Under this name, include this person's day and evening phone numbers and e-mail address. Give evening phone numbers so that journalists on tight deadlines can reach someone outside of normal business hours.

Skip two lines after the contact information and write a headline in capital letters and boldface type in the center of the page. It should resemble the style of headlines you read in the newspapers and magazines that receive your press release. It should specifically convey your message without sounding like an advertisement.

The first paragraph of text begins with the city and state from which the press release originates and the date.

Always include the Emeritus "About the Company" paragraph as the last section of text on your release.

> ***ABOUT THE COMPANY***
>
> <Community Name> is an Emeritus Senior Living community, a national provider of assisted living and Alzheimer's and related dementia care services to seniors. Emeritus is one of the largest and most experienced operators of freestanding assisted living communities located throughout the United States. These communities provide a residential housing alternative for senior citizens who need help with the activities of daily living with an emphasis on assistance with personal care services to provide residents with an opportunity for support in the aging process. Emeritus operated, or had an interest in, 289 communities representing capacity for 24,822 units and approximately 29,692 residents in 37 states at March 31, 2008. Our common stock is traded on the

American Stock Exchange under the symbol ESC, and its home page can be found on the Internet at www.emeritus.com.

The end of every release needs to include three pound signs (###), centered after the "About the Company" paragraph. The pound signs show that the press release has ended.

If your press release goes onto a second page, include a footer with the word "~More~" at the bottom of the page. Additional pages should include a header at the top left of the page. The header should repeat the title of your press release along with the page number. Do not include a page number on the first page.

The media's response to your press release depends on its quality. If it's well written, truly newsworthy and appropriate for the publication that receives it, your odds of success soar.

AD/MP 33

Whenever Possible, Include a Good Quality Black and White Photo of the Event/Story
Avoid the "grip and grin" handshake poses and sedentary group shots. Always try to show some action in photographs. Never write on a photo front or back. Provide captions on a separate piece of paper, attached with removable tape, which explains the photo subject.

Contact the Media
Start with your list of reporters/news directors that you have identified in your media plan. Call the publication and confirm the name of the reporter or editor responsible for the story with a managing editor or someone else in "editorial," that is, the part of the magazine staff that prepares article content (versus the ad sales, production, or other parts of the staff).

Ask to speak to the reporter covering the story, and jump right in! Start by identifying yourself, the name of your community and saying something like: "Hi, I understand that you're starting work on a story about < ... >. I've got something I thought might fit into the story really well, and wanted to give you a call to see if you might be interested... " (If you get voicemail, either call back later or, if necessary, leave a high Impact 20-second message; don't forget to call back later).

Be ready with your shortest, most compelling presentation of the key points of your idea. This is a sales job, and the journalist is your customer. You are likely to succeed or fail in the first 30 seconds of your presentation. If you've done your research and you're prepared, your presentation will be strong: tailored to the audience, relevant to the scheduled editorial calendar theme, creative in format or visuals suggested, easy for the reporter to understand and act upon, and helpful and valuable to the reader.

Remember your Media Relations Etiquette
Media relations is a very human, very information-intensive job. Etiquette counts, which amounts to simple courtesy, integrity and interpersonal respect. Remember that an angry editor is not likely to do you any favors! The rules of media relations behavior flow from those premises.

Respect their time: reporters are very busy, and especially in your initial contact with them, be extremely efficient in presenting your ideas or suggestions.

"No" means "No." Don't keep desperately pitching a story that the reporter is firmly convinced does not fit. It won't work. It's usually far better to move on to another opportunity, or listen carefully and come back in a few days with a better angle that responds to the problems they had with your first idea.

Tell the truth: few things are more short-sighted than misrepresenting a story to a reporter. They'll never trust you again.

If it's possible, arrange a meeting to deliver your story. Research indicates that when an editor can connect a face and name with a news release, the chance that it will be used greatly increases. You might want to personally deliver an important news release. To further develop your relationship, invite them to your community for a tour and a free lunch. If a face to face meeting is not possible, mail your story & follow up with a phone call in a few days to ensure they have received your story. They will be able to tell you at this time if your story will be "picked-up."

AD/MP 34

SUMMERVILLE
at Venice

An Emeritus Senior Living Community

NEWS
For Immediate Release

For more information:
Summerville at Venice
Sindy Kahan
Community Relations Director
200 Nassau Street North
Venice, FL 34285
(941) 485-2404

Summerville at Venice Senior Assisted Living Community Hosts a Seminar about Veteran's Benefits on Thursday, July 24th at 2:00 p.m.

VA Officer Greg Worth to Speak on Veterans Benefits

Venice, FL July 16, 2008 – Do you have numerous questions about how you or a loved one can receive Veteran's Benefits? Visit Summerville at Venice on Thursday, July 24th at 2:00 p.m. to learn the financial benefits of applying for Veteran's Aid & Attendance.

Summerville at Venice Assisted Living is hosting an educational seminar on Veteran's Benefits regarding eligibility and funding along with helpful tips to utilize when applying for Veteran's Aid & Attendance. Guest speaker Greg Worth a VA Officer will dive into how veterans and spouses of veterans, if qualified, may receive financial assistance associated with required daily assistance costs.

Summerville at Venice is located on 200 Nassau Street North in Venice. All are welcome to attend. Refreshments and hors d'oeuvres will be provided.

Please contact Sindy Kahan, Community Relations Director at (941) 485-2404 for more information.

ABOUT THE COMPANY

Summerville at Venice, an Emeritus Senior Living community, a national provider of assisted living and Alzheimer's and related dementia care services to seniors. Emeritus is one of the largest and most experienced operators of freestanding assisted living communities located throughout the United States. The Company's communities provide a residential housing alternative for senior citizens who need help with the activities of daily living with an emphasis on assistance with personal care services to provide residents with an opportunity for support in the aging process. Emeritus currently operates 288 communities in 36 states representing capacity for approximately 25,000 units and 30,000 residents. For more information about Emeritus, visit the Company's Web site at www.emeritus.com.

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AD/MP 35

VILLAGE OAKS
AT GREENWOOD

An Emeritus Senior Living Community

News

FOR IMMEDIATE RELEASE

For more information:
Village Oaks at Greenwood
Tim Tapp, Executive Director
7212 US Hwy. 31 South
Indianapolis, IN 46227
(317) 889-9822

2008 Mrs. Indiana-America Pageant on Sunday, April 13th

Local Senior Living Community Volunteers to Host Pageant

Indianapolis, IN March 26, 2008 – Village Oaks at Greenwood Senior Living community has decided to team up with the 2008 Mrs. Indiana-America Pageant to host this years pageant at the community on Sunday, April 13th from 4:00-5:30 p.m. Doors open at 3:30 p.m. Admission is free and the general public is welcome to attend. The pageant will be held in the community dining hall.

Each of the three contestants of the Mrs. Indiana-America will compete for the crown in three categories: personality interview, swimsuit and evening gown (Note: swimsuit judging will take place in a private room in respect of the community residents). Guest judges include Tim Tapp, Executive Director and Margaret Vandyke, Activities Director at Village Oaks at Greenwood and special guest judge Judy Cramer, Community Relations Director at an Emeritus sister community, Meridian Oaks in Indianapolis.

The winner crowned 2008 Mrs. Indiana-America will over the next year make a public appearance at all Emeritus Senior Living communities in Indiana: Village Oaks at Greenwood, Meridian Oaks, Brentwood at LaPorte, Brentwood at Hobart, Village Oaks at Fort Wayne and Brentwood at Elkhart. Dates to be announced.

Village Oaks at Greenwood is located on 7212 US Hwy. 31 South in Indianapolis. For more information, please contact Tim Tapp, Executive Director at Village Oaks at (317) 889-9822.

ABOUT THE COMPANY

Village Oaks at Greenwood, an Emeritus Senior Living community, a national provider of assisted living and Alzheimer's and related dementia care services to seniors. Emeritus is one of the largest and most experienced operators of freestanding assisted living communities located throughout the United States. The Company's communities provide a residential housing alternative for senior citizens who need help with the activities of daily living with an emphasis on assistance with personal care services to provide residents with an opportunity for support in the aging process. Emeritus currently operates 288 communities in 36 states representing capacity for approximately 25,000 units and 30,000 residents. For more information about Emeritus, visit the Company's Web site at www.emeritus.com.

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Meet the Media

The reporter will do one of two things if they decide to run your story. They will either use just what you've given them or they might visit your community and arrange a personal interview covering the event/story. If they come to your community, make sure that the staff knows about the visit and everything is in tip-top shape. After the story is printed/aired it's always best to send a thank-you note and compliments on their article with a promise to stay in touch should other stories become available.

Important Tips Regarding Writing a Press Release:

- Always use white paper.
- Type only on one side of paper.
- Keep the type font easily readable (at least 12pt.).
- Double or triple space.
- Always include the release date or the underlined and capitalized 'FOR IMMEDIATE RELEASE.'
- Always put the name of a contact person for the media at the top of your release. As far as the contact within the release information, it is your choice as to whether you want to put a specific name or just request they call the community in general. Putting a specific name might limit the ability of someone to get general information or questions answered if the contact person is not available. It might be better to have everyone who might answer the phone knowledgeable about your events.
- Dateline- usually seen at the very start of the release, i.e., (New Port Richey, FL- April 5, 2004). This is optional. It may only be important if you are sending a release to a bigger regional paper, where location may be more important. It isn't necessary when the paper is in the same town as the community.
- Always end your release with three 'pound' signs (###) or the word '-END-'. If your release is more than one page (it rarely should be), you should write the word '-More-' at the bottom of the page. Additional pages should have your headline at the top left, with page number under (i.e., 2-2-2). These words or symbols help a reporter quickly know where your release ends and allows them to keep your pages together.

How to Get Up Close and Personal with Your Local Media

An easy way to begin is to take advantage of any holidays that involve media or businesses. Bring a tray of bagels or pastry to them and tell them how much you appreciate their contribution to the town or area. I suggest at least three such visits, without any agenda. In other words, don't use those times to talk about your events or releases, unless asked. Your goal here is just a 'getting to know you' visit. Pay attention to things that are said (create relationship profiles for these people as well) and maybe in the future you can bring a customized token gift for a birthday or related to something of interest to them. For example, if a reporter tells you he's having a baby soon, you may send a small baby gift. If the front desk person (don't underestimate their power within the organization) tells you they love theater, consider bringing two tickets to a local production or a CD Soundtrack of their favorite musical.

After you've properly built these relationships, it is likely that anything you request or submit will get special consideration. It's worth the effort- and you can make some wonderful acquaintances!

Another way to build a relationship with the media is in trying to work co sponsorships with them. It may require that you take on the lion's share of the work in organizing and implementing the event, but the media's co-sponsorship will naturally result in endless endorsements, mentions and even casual banter regarding the upcoming event and your co-sponsorship. You can't buy that kind of relentless advertising. Even better that the event should take place at the community; your address will be ingrained in listeners' and/or viewers' minds.

Still another method of maximizing your publicity and building relationships with media contacts is to invite them to volunteer at an event. You could ask them to come to present an educational seminar, or they could participate on a panel of experts or judges. One community asked a local news co-anchor to volunteer to read to the residents for a family stories month fireside reading, with amazing results. The anchorwoman not only came to read a story, armed with cameramen to cover the event for the local news, she was so impressed with the experience that she requested to be a regular volunteer at the community. In addition, she gave casual banter on her news broadcast about how fulfilling the experience was and gave a testimonial to how she would gladly have her grandmother live in such a community. Again, you can't buy that type of publicity. In fact, it cost the community nothing, but yielded not just television coverage, but also an on-going relationship with an important local media contact.

In addition to these types of relationship-building activities, communities should consider infiltrating the media themselves. For those who are feeling particularly bold and confident, volunteer specialists among the staff to be guests on local radio and cable television programs. Write letters to the editor or opinion pieces that will bring positive exposure to the community, or offer to write regular informational pieces to the local newspapers. Even creating a local access cable television program is not as difficult as it would sound, and would make you a household name in your viewing area.

AD/MP 38

Tips on How to Maintain Good Media Relations

- Do NOT call a reporter or media contact after e-mailing a release to see if they received it. Do no hound the news media to find out if they're going to come to your event. It will only antagonize them. Unless you have an already established relationship with the media contact, keep your follow-up calls to a minimum.
- Do not send attachments to e-mailed releases unless they have requested it. Unsolicited attachments tie up bandwidth, risk computer viruses and generally annoy media contacts. If you are e-mailing a follow-up release with pictures, you can copy the picture(s) onto a second page of the release. Either that, or consider physically dropping off the release with the picture(s).

Flyers

Now, I'd like to say a few words about flyers. Flyers are the easiest and most creative way to publicize your event. You can post them everywhere, distribute them or mail them to anyone and everyone you are trying to reach. They should be colorful and exciting, to attract attention. These days, you don't need to be a professional printer or desktop publisher to generate these materials for any event or promotion you have planned.

For those who have Publisher software, templates of flyers with sophisticated backgrounds are easily available- and publications are fairly easy and user-friendly.

Having said that, I'd like to say that, with a brief lesson, Microsoft Word can offer you most of the same options to create a flyer that looks as professional and exciting as most other publishing software. The best news is that everyone already has Microsoft Word on his or her computer, so there's no additional software cost. So here is the brief lesson:

Fonts

Starting with the idea of font choices, the Word toolbar offers many choices of fonts, and almost any point size of font. You can experiment with these to see which font reflects the mood you want to set with your flyer. Keep in mind, though, that you still want it to be easily readable from a posted distance.

Borders and Shading

When using Word, you can find options for borders by clicking 'Format' on the toolbar and then choosing 'Borders and Shading.' Within that window, you will find all of your options for Paragraph Borders, Page Borders and Shading. If you click on the 'Art' scroll in the Page Border section, you will see a myriad of interesting borders, some of which can have colors changed. You can also decide the point size of these.

Graphics

In order to insert graphics onto your flyer, you only need to click 'Insert' on the tool bar, choose 'Picture' and then 'Clip Art.' The Microsoft 'Insert Clip Art' main window will open. There will be pre-determined categories for the clip art that is already saved to your computer. While there are some interesting options there, you are not limited to these. If you are hooked up to the Internet, you can click the 'Clips Online' icon. This will take you to the Microsoft Clip Art Gallery website. It's the home page for Microsoft Clip Art and Media. This site contains hundreds of graphics that you can download to your computer- or just copy from their location to your flyer. If you can download these graphics, it gives you more flexibility in how to utilize them. Also it allows you to use them later, even when you are not online.

Press Kits

Your public relations should include the basic PR materials a journalist will expect - typically a 1-2 page company profile or "Backgrounder," a 1-page fact sheet on each of your services or amenities, perhaps one or more relevant recent press releases, and clear sources for additional information. These materials should be assembled in a press kit folder for a more polished presentation. (Your community folder should work just fine).

While press kits tend to stand out in the pile more than a press release, they're also more costly and risky. Some reporters find unsolicited press kits annoying and wasteful, so it's best to send them on request only.

The press kit should provide helpful, relevant information that builds on your press release. Do not send reprints of advertisements, sales brochures, or point-of-sale displays. Journalists want straightforward information, not fluff.

Example: Rather than send a flowery description of your company's "mission" or your "vision," provide an easy-to-understand corporate history in timeline form. It might include the date of key events:

- grand opening of your community;
- hired your 50th or 100th employee;
- introduced a new service;
- how your community is a positive impact on the city

If you have reviews from other newspapers or magazines or news articles about you or your community, send copies of these clips with the name of the publication where they first appeared and the issue date.

If you want producers to book you on radio/TV interviews, have your press kit include a list of your prior appearances (date, name of host, station call letters), possible topics for on-air discussion and sample questions you're ready to answer. You might also include a page of testimonials from other hosts who have enjoyed your guest appearances ("callers lit up our phone lines," "what an articulate and fascinating guest!").

Tip: If you mail 200 press releases, prepare at least 10 press kits so that you can promptly follow up for those recipients who request additional information.

It's customary to use a glossy folder for your press kit. Place your press release in the right pocket of the folder. Include your business card in one of the pockets.

AD/MP 41

For more information on editorial calendars and free access to immediate story opportunities in almost any market, visit the editorial calendars website www.edcals.com. To learn more about public relations and a wide range of tools in the PR trade, contact Media Cision Directory www.mediamaponline.com or Bacon's Information www.baconsinfo.com for additional information.

AD/MP 42

FILLING FILLERS

Fact Sheets

Fact sheets are used to introduce the media to a new business, concept, issue, etc. Fact sheets should be used to:

- Educate the audience about your community,
- Give information about Emeritus Senior Living,
- Discuss Senior Housing Alternatives or
- Define Assisted Living

Key Statements

<Community Name> is operated by Emeritus Senior Living. Emeritus Senior Living is a fully integrated senior housing services company focused on operating 289 residential-style assisted living communities in 37 states.

Emeritus General Statement

- Emeritus Senior Living is one of the nation's largest providers of superior residential housing and on-site support services to seniors who choose to no longer reside completely on their own.
- Our philosophy is to respect the dignity, privacy and independence of our residents by encouraging individual choices in how they enjoy and enhance their lives. We also promote a sense of community among residents, their families and staff to ensure a sense of place, belonging, of home.

Quality Improvement Statement

- Our residents' quality of life is our primary concern. That's why we hold ourselves to the highest standards by using a system-wide continuous quality improvement program.
- We look at our continuous quality improvement process and make improvements, as necessary, that are aligned with our mission.
- We survey our residents and their family members about our services and performances on an annual basis.

Overview of Senior Living

The concept of assisted living has grown tremendously in the past few years as many Americans are living longer, healthier lives.

AD/MP 43

Senior Housing Definitions

- Assisted Living Community - A special combination of housing, personalized supportive services and health care offered in a residential setting. The services are designed to respond to the individual needs of those who need help with activities of daily living, but do not need constant skilled medical care.
- Nursing Home - Provides 24-hour skilled care for the more acute patients. Patients generally rely on assistance for most or all daily living activities (bathing, dressing, and eating).
- Continuing Care Community - A community which offers several levels of assistance, potentially ranging from independent living to nursing home care.
- Retirement Community - For active seniors who are interested in group social events, but do not need personal or medical care. Home maintenance, and often meals and housekeeping, are provided.
- Alzheimer's/Memory Care Neighborhood – A community that provides seniors who have Alzheimer's disease or related dementia with a safe and secured environment. Our innovative memory care approach, "Join Their Journey" encompasses many components that provide us the ability to meet each resident's and family's needs at each stage of the disease process.

Older American Demographics

Today, more and more seniors are living longer than ever before. In fact, research indicates that our population of Americans aged 65 and older will continue to skyrocket:

2010 40.1 Million Americans Aged 65 +

2020 53.3 Million Americans Aged 65 +

2030 70.2 Million Americans Aged 65 +

- In the year 2030, about 20% of the population will be 65 and above, representing the aging baby-boomers.
- According to US General Accounting Office figures, approximately seven million older people need assistance with daily living activities.
- Although many elders may need some assistance with personal needs or medication, aging with independence and dignity remains of paramount importance to most seniors.

AD/MP 44

Public Service Announcements
Another way to increase awareness of assisted living and your community is through a radio public service announcement. Radio stations determine which PSAs to air and do so as a public service at no cost. When providing PSAs to radios, type them on your letterhead, double spaced, one per page and deliver them to your local radio station two weeks prior to the month they should broadcast.

Example:

Book Fair
If you are an avid reader or want to get an early start on holiday shopping, < community name> is hosting a Books Are Fun Book Fair. Don't miss out on Great Books at Great Prices! Books Are Fun features diverse, current titles of top quality books at up to 70% off retail prices. New York Times best sellers, Children's educational and storytelling books, Home and Gardening books, Cookbooks, Inspirational books , Sporting and Health books. Please join us for our book fair at <community name> Senior Living Community, on <date> <time> for quality books at discount prices. Five percent of the proceeds will support <local charity>. Stop by<address> on <day & time> or call <phone>.

Alzheimer's Disease Support Group
If you or someone you know is caring for a loved one with memory loss, there is a support group in your neighborhood. <Community Name>, is hosting a gathering of care professionals to support the families of memory loss challenged loved ones. The group will discuss how to deal with the huge range of emotions displayed by those suffering from Alzheimer's disease and Dementia, along with other topics of interest. Support groups will be meeting <day of the week> at <community name> senior living beginning at <time>.Please join us at <community name> Senior Living Community to meet new friends and have healthy discussions. Bring your questions and find better ways to cope with your day-to-day challenges. Everyone one is welcome. Stop by <address> or call <phone>.

AD/MP 45

CRISIS COMMUNICATION

Developing a Crisis Communication Plan

Most public relations campaigns focus on how to attract the media to create favorable publicity for your community. However, it's important that your public relations plan also include a crisis communications plan, so that you know how to deal with the media when they come to your door on the heels of a crisis.

What is a Crisis?

For most organizations, a crisis is an unexpected and unpleasant event that has a negative impact on your operations and requires immediate attention and action. During a crisis, careful, truthful communication is a must. An inappropriate response can severely damage your image, externally, and disrupt your internal procedures and operations.

For the assisted living community operator, a crisis could result from any number of events impacting on your good reputation - ranging from a fire, to an intruder, to a staff walk-out. Because you never know when it's going to occur, the very best time to plan for a crisis is now. Too many organizations plan for a crisis after a crisis hits, and then do their best to respond.

Plan for a crisis now

The very first step is to evaluate your community and assess your existing communication policies. If your community does not already have a good working relationship with the media, now is the time to get to know your media, establish rapport, and initiate a media relations program. You don't want to be in the situation of the only time the media hears of you is in a negative context.

Begin preparing for a crisis by developing a Crisis Communication Plan. The plan should have the full support of management. Although the plan will serve as your blueprint for responding to a crisis, it does not have to be a lengthy, complicated document. Rather, it will define the roles and responsibilities of each member of the crisis team and provide a checklist of what needs to be done and who takes responsibility for each action.

AD/MP 46

Media Sweeps & What That Means to You

There are particular times during the year when media interest can be particularly strong. These are called "sweeps" periods and they happen during February, May and November every year. Sweeps periods are the timeframe during which television stations compete for ratings to establish advertising rates, and therefore they air programs and news stories designed to increase their viewership. Because senior care is an emotional issue for families, this tends to be a story topic covered during those periods.

In general, you should know that during past sweeps periods, reporters have gone through licensing files to review licensing citations in order to generate stories. You should also be aware that anyone who walks through your community's door, whether it's to come in to visit a relative, interview for a job or tour your community, could have a hidden camera.

What do you do if the Press Calls?

If you have a crisis in your building and the press calls, don't panic. Be prepared! Anticipate the worst case scenario and plan for it. If you are ready for the difficult issues, it will be easier to respond. Be direct. **Don't ever lie, mislead, or stonewall.** If you can't respond openly, it's best to postpone the interview.

Key Media Tips

Before agreeing to a media interview, remember to do the following:

- Verify the reporter's affiliation
- Ask what the reporter wants to discuss
- Carefully screen requests for an interview
- Ask Yourself
    - What opportunities does it afford?
    - What factual information do I need?

AD/MP 47

KEY MEDIA TIPS

Before conducting a media interview, take the following steps:

Ask yourself:

- What knowledge does the reporter have of the issue?
- Do they have any bias?
- Who else have they talked to?
- Where does our point of view fit into their agenda?

- Gather the facts about the story
- Anticipate likely questions and rehearse them
- Decide where to conduct the interview
- Call RDSM, RDO, VPSM, VPO

Before conducting a media interview at your community, do the following:

- Check the grounds, signs and overall appearance of your community
- Alert and prepare staff
- Identify a specific area for the interview
- Direct reporter to on-site spokesperson
- Remind reporter of residents' right to privacy
- Remind reporters not to take photographs of residents without written consent

Every interview is an opportunity to present positive information:

- Prepare 2-3 key points
- Listen and wait for entire questions
- Begin each answer with a key point
- Answer with positive statements
- Keep answers short and concise
- Pause and keep cool. Collect your thoughts. Don't be afraid to think before you answer
- Smile, be polite and avoid jargon
- Never say anything "off the record"
- Never lie

AD/MP 48

A FEW KEY REMINDERS…

The following is a checklist of company policies and procedures that should be monitored on an ongoing basis and reviewed with staff periodically. These are areas on which the media tend to be particularly interested in reporting. Specific sections of the Emeritus Policy & Procedure manual are cited for your reference to provide more detailed information regarding each policy.

- Arrival Procedures
- Attendance Departure
- Procedures Dispensing and Storage of Medicine
- Emergency Preparedness Guidelines
- Employee Reference Checks
- Facilities Management
- Food Allergies/Food Restrictions
- Handling Significant Events
- Handling the Media
- Health Policies
- Monitoring of the Front Office
- Posting of Emergency Telephone Numbers
- Safety Policies
- Vehicles/Maintenance and Registration
- Vehicle/Transportation Procedures

AD/MP 49

HOW CAN PUBLIC RELATIONS BOOST MY BUSINESS?

- Increase Sales
- Build Credibility
- Forge a Customer Relationship
- Penetrate New Markets
- Attract Investors

Integrate

Use your PR results to maximize your advantage. How? Integrate them into your other sales and marketing efforts. This will help offset the cost of producing PR materials.

Some ideas for making the most out of your PR efforts:

- Reprint articles and news blurbs and use them as supplemental literature for direct mail packages and as handouts at trade shows.
- Use positive quotes in your advertising to enhance credibility.
- Provide your sales force with copies of feature articles that they can pass along to referral sources on sales calls.
- Send copies of news articles to potential investors.
- Record your speeches and give audio tapes to clients, journalists, and potential customers.
- Take names from contest entries and add them to your mailing list of potential customers.
- Contact the Seattle S&M department to get your community news stories/clips posted on your community website.

AD/MP 50

Establish your PR Mix

You'll never know what PR tools will yield the best results until you test them. While some benefits of PR are intangible - such as the goodwill generated from charity events - much of your PR will measurably impact your bottom line.

Based on your measurable PR results, establish your PR program for the upcoming year. Allot a percentage of time you'll spend on each of the following:

	Tool	Time%
1.	Press Releases	
2.	Press Kits	
3.	Tip Sheets/Newsletters	
4.	Special Events	
5.	Speeches	

CRAFT YOUR PR MESSAGE

Use this exercise to sharpen the focus of your PR campaign. By identifying exactly what you want to achieve as a result of PR, you can maintain consistency and ensure all your spokespeople/employees stay "on message" when interacting with journalists, customers, and the general public. Answer these questions:

If your audience (such as a reporter, a potential client, or a group listening to your speech at a conference) takes away just one point from your PR message, what would it be? Limit your answer to one sentence.

What do you want your audience to conclude from this point about your company?

Follow this Three-Step Process to Define your PR Campaign:

1. List all the themes or messages you want to plant in your audiences' minds. Brainstorm with your management team so that you get plenty of input. Ask them, "What do we want to tell people about our company? What makes us different/special? Why should others care?" Include benefits of your services & amenities, unique aspects of your business, impressive or startling statistics about your business, etc.

2. Review your list. Select the three most compelling themes or messages that you want to communicate through your PR campaign.

3. Compose a sentence that summarizes your "PR statement." Include the three most important points that will drive your PR efforts. Example: [name of your community] expects to grow at an annual rate of 35% by serving a largely untapped market that xxx.

Educate everyone on your team about your PR statement. Make sure they reinforce this message whenever they embark on PR-related activities. Revisit this PR statement every quarter. Fast-growing communities often need to change how they position themselves to attract the kind of positive press that advances their goals.

AD/MP 52

MEDIA RELATIONS AND PUBLICITY

There are many wonderful things that Emeritus communities across the country are doing every day that are excellent opportunities for positive publicity. This section includes some of those ideas that you already may be doing in your community and maybe a few more you haven't thought of. These suggestions are designed to be easy to implement. We've created this guide to help you find fast and easy, yet very effective methods to obtain and generate positive publicity for the things your community is doing. This information has been broken out according to the different types of activities to make it easier for you to quickly reference the information:

Current Events/Political Activities

- Contact a local politician who is actively involved in senior care issues and ask him or her to visit your community to talk with staff and families about the issues currently facing families and seniors. This is a great photo opportunity for TV or newspaper.
- If you follow national politics and know that a national forum on senior care is going to take place, hold your own forum locally, inviting local politicians and senior housing/care professionals, such as someone from your local ALFA chapter. The television media are usually interested in a local angle of a national story.
- Voter Registration Day - all local candidates are invited to speak, the public is invited and encouraged to mingle with residents.

Field Trips

Field trips are good photo opportunities, especially if the seniors are doing something really unusual. Some examples are:

- Visit your state capitol and see if a local politician would be available to talk with the seniors about important legislation regarding senior issues.
- Make your visits from childcare centers more interesting by having seniors interact as much as possible with the children. Pictures of seniors dancing with children or cooking with them make great photos.
- If your community collects clothing items, food, books or toys during the holidays to donate to a local shelter, have your seniors deliver the items and turn it into a photo opportunity.

AD/MP 53

Fundraising

- If there is a family who has fallen victim to a disaster, organize a disaster relief effort for the family with your community as the collection point for needed items.
- If a natural disaster happens in your area such as a flood or earthquake, volunteer your community as a collection point for donated items.
- Community service projects can be publicized. Keep track of the number of staff hours donated and amount of food or clothing collected so that information can be announced to the media.
- Coordinate a wheelchair-a-thon or walk-a-thon for a local charity.

Health, Safety & Nutrition

- Senior Athletic Games or Art Shows. Coordinate, participate or sponsor these local events.
- Check with your health department to see whether you can host a depression screening at your community. Many health departments provide this service free of charge and need facilities that would be willing to host such events.
- Host CPR and First Aid certification classes and invite families and assisted living professionals in the community to attend.
- Host a senior identification event at your community for families to document information about their loved ones like vital statistics, fingerprints and current photos in case the senior ever becomes missing. Call your local crime prevention authority for information on organizations that provide this service.

Aging Parent Education

- Host how to deal with aging parent seminars and open them to not only your community's family, but families in the community as well. Coordinate guest speakers to speak on topics such as how to deal with guilt, Alzheimer's, moving them into a new environment or fitness and nutrition.

MEDIA RELATIONS AND PUBLICITY CONT.

Seasonal Activities

- Multicultural activities such as Kwaanza celebrations or Cinco de Mayo events are great photo opportunities.
- Coordinate a cleanup effort at a nearby park in conjunction with Earth Day, which happens in April every year.
- January is National Eye Care month. Contact the health department to see if they would come to your community to conduct free eye exams for the community or see if an ophthalmologist in your community would be willing to donate time for this service.
- Sponsor an Easter event for your community's families and the surrounding community with the Easter Bunny and an egg hunt. Look to see if there is a neighborhood childcare center to host an egg hunt for them. Encourage all of your residents to wear their Easter clothes, as an activity, make Easter bonnets and host an Easter Parade.
- Host a Halloween carnival or party that offers a safe alternative to trick-or-treating. Communities have offered haunted houses, trick-or-treat streets, pumpkins walks, costume contests and more to make their events attractive for families in the area with children.
- In conjunction with Grandparents Day in September, invite your families in for a lunch to recognize the importance of the contributions grandparents make in their lives.
- Host a Thanksgiving or Christmas feast at your community.

Staff Recognition

- Do you have a staff member in your community who has been recognized in the community or won an award for community service or excellence? Maybe you have a staff member who is utilizing some unusual methods of service or has really gone above and beyond to accommodate a senior with special needs. These are wonderful opportunities for human interest stories that the media may find of interest.

Hobbies, Accomplishments, Associations

- Uncover the background and accomplishments of residents, staff and even family members. You might find that a staff member is in a local band, a resident has been writing a memoir or a family member is the head of a local charity. These interests, hobbies and accomplishments are wonderful human interest stories that the media may find of interest.

WAYS TO CREATE PUBLICITY

- Tie in with news events of the day.
- Work with another publicity person.
- Tie in with a newspaper or other medium on a mutual project.
- Conduct a poll or survey.
- Issue a report.
- Arrange an interview with a celebrity.
- Take part in a controversy.
- Arrange for a testimonial.
- Arrange a speech.
- Make an analysis or prediction.
- Form and announce names for committees.
- Hold an election.
- Announce an appointment.
- Celebrate an anniversary.
- Issue a summary of facts.
- Tie in with a holiday.
- Make a trip.
- Present an award.
- Hold a contest.
- Pass a resolution.
- Appear before public bodies.
- Stage a special event.
- Write a letter.
- Release a letter you received.
- Adapt national reports and surveys for local use.
- Stage a debate.
- Tie into a well-known week or day.
- Honor an institution.
- Organize a tour.
- Inspect a project.
- Issue a commendation.
- Issue a protest.

AD/MP 56

TIMING IS EVERYTHING

Coordinating your events to coincide with certain times of the year can maximize the potential for the media to be interested in covering your story.

The following is a list of different topics that are focused during certain times every year. Additional monthly holidays can be found in the Great People Great Relationships calendar located on the E&ME (Emeritus Employee Intranet) Library under Sales & Marketing/GPGR Program. The topics included were chosen because of their potential for raising awareness for special senior issues or causes. These events may provide a "hook" for introducing more consumers to the concept of assisted living. You may want to consider some type of open house. This can be promoted through press releases to state consumer media and area special events calendars at area hospitals, churches, Area Agencies on the Aging, etc.

January
National Eye Care Month
National Glaucoma Awareness Month
Cervical Cancer Screening Month
Women's Self-Empowerment Week
National Medical Group Practice Week
Martin Luther King's Birthday
Family Fit Lifestyle Month

February
American Heart Month
National Black History Month
Women's Heart Week/Wear Red Day
National Weddings Month
Boy Scouts of American Founded
National Senior Independence Month
Valentine's Day
Presidents' Day

March
American Red Cross Month
National Kidney Month
National Nutrition Month
Wellderly Week
Save Your Vision Week
Girl Scouts of America Anniversary
Easter Sunday
International Brain Awareness Week
National Social Workers Month

April
National Humor Month
Stress Awareness Month
Earth Day
National Garden Week
National Library Week
National Women's Nutrition Week
Medication Safety Week
National Parkinson's Awareness Month

May
Mother's Day
National Nurses Day & Week
National Arthritis Month
Cinco De Mayo
National Stroke Awareness Month
National Osteoporosis Prevention Month
National Senior Health & Fitness Day
Older Americans Month
Healthy Vision Month
Armed Forces Day
World Red Cross Day
Memorial Day
National Nursing Home Week

June
D-Day Anniversary
Pause for the Pledge Day/Flag Day
Father's Day
Nursing Assistants Day & Week
Baby Boomers Recognition Day

AD/MP 57

July	**October**
Anti-Boredom Month	Family History Month
National Blueberries Month	Flu and Pneumonia Campaign
National Mobility Month	Health Lung Month
National Recreation and Parks Month	National Depression Education and Awareness
American with Disabilities Act Anniversary	National Pharmacy Month
	National Spinal Health Month
	National Storytelling Festival
August	UN International Day of Older Persons
Japan's Unconditional Surrender Anniversary	National Pharmacy Week
Smithsonian Institution Founded Anniversary	National Senior Games – Senior Olympics
V-J Day	
National Relaxation Day	
	November
	National Alzheimer's Disease Month
September	National Diabetes Month
International Self Awareness Month	World Peace Day
Library Card Sign-Up Month	Great American Smokeout
National Cholesterol Education Month	National Game & Puzzle Week
Labor Day	
National Assisted Living Week	
Grandparents Day	**December**
Older Adult Say Services Celebration Week	Universal Human Rights Month
National Vision Rehabilitation Day	Pearl Harbor Day
National Good Neighbor Day	Hanukkah
	Christmas

HOW TO CONDUCT A SPECIAL EVENT/OPEN HOUSE/SITE TOUR

The best way to educate and influence a prospective audience, whether it be the press, a politician or a prospective resident is to encourage a tour of your community. By spending some time at your community, your visitors can see for themselves the assisted living model of service in action - the environment, the lifestyle of the residents, the amenities, etc.

A special event or open house can be run in conjunction with a commemorative week or month (May - Older Americans Month) or as part of a local celebration (the annual festival or celebration of the town's birthday). In addition to special guests, these events are usually open to the public. A site tour is generally designed as a way of educating a specific VIP or group of VIPs and would not be as structured, or include speakers.

However, a successful open house means planning and forethought. Some communities have been successful in creating a committee to help plan and implement an open house. The committee might consist of staff, residents, families and volunteers. The most critical elements of the plan pertains to the program and its promotion.

The Program
Any visit or tour of the community should include the following elements:

- Introduction of key staff members
- Explanation / Overview of senior living
- Tour of your community
- Showcasing of resident activities
- Interaction with residents during lunch or other social settings

Agenda
Welcome. Use the fact sheets on Senior Housing, Emeritus and your community to educate the audience about the state of senior housing needs today. Then, based on your own community fact sheet, explain your residence and the range of services you provide. Throughout the welcome, continue the theme of supporting and celebrating the lives of your residents.

Guest Speaker
If you're having an open house or a special event, invite a local elected official to speak. Suggest that the nature of the comments include references to the assisted living community as a member of the larger community and the role it serves as a community citizen.

Focus on a Healthy Lifestyle
This presentation, offered by the activities director, should include specific programming concepts offered by your community which provide your residents an opportunity for healthy aging. Discussion should include examples of fitness or creative activities.

AD/MP 59

Other Considerations
A number of other elements must be considered for the event. First, as mentioned earlier, all residents must be briefed on the activities planned, and in the case of "spotlighted" residents, you may want them to sign a consent form especially if you anticipate media attendance. Because the community is not a public place, you will want to assure your residents' privacy if they are not comfortable with having their photo taken. Also, consider contingency plans if inclement weather will affect the activities or if one of your spotlighted residents is taken ill.

Promotion
Now that your program is set, it's time to work on the promotion phase of the planning. Ideally, this should begin about six weeks prior to the event. There are several stages to this phase.

Prepare an invitation list, to include community citizens, area lawmakers, long term care professionals, hospital discharge planners, Area Agency on the Aging representatives and other elder care policy makers, AARP representatives, local media and friends and family of guests. Your guests of honor will be residents and staff.

Announcements of the event should be in the form of personal letters of invitation to special guests and to the community at large, via the media, and other sources.

- Press Release
- Radio/TV community "bulletin boards"
- Newspaper events listings
- Posters in public buildings
- Posters in hospitals

If done correctly, a special event or site tour can have the most powerful and long-lasting effect than any other single program.

TIPS FOR TAKING PHOTOS

- Take pictures of 4 people or less - no group photos.
- Take candid or action shots - avoid posed pictures.
- Include all necessary body parts in the frame of the picture. The media can crop excess space but they cannot add missing limbs.
- Use either color or black and white film. The media cannot reproduce Polaroid pictures.
- Purchase a disposable camera if you do not have a camera of your own.
- Remember to have photo releases signed by each resident presented in the photo.

Photos

A bit of information about photos ... Many community directors like taking their own pictures of events and then submitting the pictures to the papers themselves along with a caption. We encourage you to do this if it is something you would enjoy doing. However, if you take pictures of your event and don't want to handle writing the captions and submitting the pictures to the paper, please contact your RDSM.

An Important Reminder

If you take pictures of seniors in your community to be submitted to the paper, you must obtain their permission to use that photo. Included in this manual is a photo release form that can be photocopied and used for this purpose. For legal reasons, it is necessary to have this release form. If you have questions about this requirement, contact your RDSM.

EMERITUS
Senior Living

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I understand that I will not receive any monetary compensation from Emeritus Corporation for the rights granted under this Permission and Release.

I have the legal right to provide the grants and releases set forth herein.

Printed Name of Image/Model	Signature of Image/Model
Title (e.g. resident, employee, etc):	Location
Date	

Witness (reviewed and approved by):	For Seattle Office Use Only: Insert identifying photograph of Image/Model
Printed Name of Witness	
Signature of Witness	
Title	
Date	

AD/MP 62

MEDIA REFERENCES

Media Listings/Directories

Editor and Publisher International Yearbook, (646) 654-5500
National PR Pitch Book, (800) 959-1059
Oxbridge Directory of Magazines and Newsletters, (212) 741-0231
The Yearbook of Experts, Authorities & Spokespersons, (202) 333-5000 or (202) 333-4904
Writer's Market, (800) 317-6758

Media Database Software/Web Press Releases

Publicity Blitz, Bradley Communications, (800) 989-1400
Medialink, (800) 843-0677 or (212) 682-8300

Wire Services/Press Release Distribution

PR Newswire, (800) 832-5522

Clipping Services

BurrellesLuce Press Clipping Service, (800) 368-8070
eWatch Internet Monitoring, (800) 832-5522
Bacon's Information, (312) 986-4977

Associations

Council of Public Relations Firms, (877) 773-4767
National Investor Relations Institute, (703) 506-3570
Public Relations Society of America, (212) 460-1400

Books

Asher, Spring and Chambers, Wicke, *Wooing & Winning Business: The Foolproof Formula for Making Persuasive Business Presentations,* John Wiley & Sons, 1998.
Bly, Robert, *Targeted Public Relations: How to Get Thousands of Dollars of Free Publicity for Your Product, Service, Organization, or Idea,* Henry Holt & Company, 1994.
Leech, Thomas, *How to Prepare, Stage, & Deliver Winning Presentations,* AMACOM, 1992
Levine, Michael, *Guerrilla P.R.: How You Can Wage an Effective Publicity Campaign... Without Going Broke,* HarperBusiness, 1994.
Lesly Philip, *Lesly's Handbook of Public Relations and Communications,* NTC Business Books, 1998.
Marcus, Bruce W. and Wallace, Sherwood Lee, *New Dimensions in Investor Relations: Competing for Capital in the 21st Century,* John Wiley & Sons., 1997.
Pinsky, Raleigh, *101 Ways to Promote Yourself: Tricks of the Trade for Taking Charge of Your Own Success,* Avon Books, 1999.

AD/MP 63

BACK UP TEAM PROTOCOL

Big Picture

As a Community Relations Director you'll be maintaining a balance between external and internal sales and marketing. Towards that end it will be critical to maintain a strong closing focus with your Back Up Team while you keep the referrals flowing into your community. The key to making all of this work will be in your ability to recognize where there are areas of opportunity with regards to the sales process and by providing initial and on-going training/coaching for your team.

We define our Back Up Team as anyone who has been trained to work with customers on potential sales when the Community Relations Director or Executive Director are out of the community/unavailable. This will be different for different communities. In some Emeritus communities, the Back Up Team is the entire management team. In others, it is a mixed group of managers and line staff who have been hand-picked for their skills and willingness to work in the sales arena.

Our Expectations

It is an Emeritus expectation that all department heads are trained on the following:

- taking an inquiry call,
- providing a tour experience, and
- being able to secure next steps that will advance the sale. Examples of next steps include:
    - Scheduling a home visit,
    - Scheduling a tour experience,
    - Scheduling the nursing evaluation,
    - Collecting a Priority Reservation Agreement, or even
    - Closing the sale by securing a commitment to move in.

As Community Relations Director it is expected that you will partner with your Executive Director to use a variety of tools and systems to train and help maintain your Back Up Team's effectiveness.

Evaluating Your Back Up Team

Evaluating your team is the first step in understanding if your Back Up Protocol is in place, allowing you to work smarter not harder. Listed below are several tools and systems you can use as part of a successful plan for occupancy growth. You will want to partner with your Executive Director during this evaluation process for their support and advice.

a. **Manager Interview:** This is simply sitting down with your fellow department heads one on one to ask what portions of the sales process they are comfortable with and which areas they would like additional training. You should continue to periodically interview managers to ascertain the effectiveness of your training and coaching. A very important reminder: don't forget to celebrate their successes!

b. **Shadow Your Teammates:** Partner with Managers and key players to see first hand how they take a phone Inquiry, give a tour experience or close a sale. Offer the appropriate training as needed and continue to support their efforts.

c. **Utilize You've Got Leads (YGL) Reports:** Target your back up training efforts in the areas where you and your team have the opportunity to make the most impact. Utilize **You've Got Leads** reports such as the *Conversion Trend Summary* and *Sales Pipeline* reports to identify your community's sales ratios. Your team may be exceptional at converting tours to closes, but have a lot of opportunity getting people to come into the community after taking an inquiry. Strategize on where you need to spend the most time training.

d. **Mystery Shop Your Community:** Personally call the community at different times of the day and on the weekend. Use the *Mystery Shop Guidelines Tool* found on E&Me to help prepare you for the call.

e. **Auditing Inquiry Forms:** Always audit team members' inquiry skills by reviewing how well they utilized the Connections Forms. Do you see any patterns with certain managers? Are there large gaps in information? Did they ask all of the questions? Is there an absence of time activated next steps?

f. **Follow Up:** As a Community Relations Director you'll be following up with all inquiries so make sure you are using Emeritus tools such as the *Follow Up to an Experience form* found on E&Me.

g. **The Concierge:** This individual is hugely important in regards to the first impression that your community makes on an inquiry. They are often the first person to respond to inquiry calls and scheduled or walk in tour experiences (see Concierge job description on E&Me). You will want to make sure you are partnering with your Executive Director to make sure the most qualified individual is placed in this role. Be sure to include the Concierge in all of your team training.

Training the Back Up Team

Making sure the Back Up Team is prepared and executing their role correctly is an ongoing process. Here are some suggestions to ensure your training is successful.

a. **Model Sales Behaviors:** Make sure team members are seeing the "Expert" in action. Schedule time as necessary so they can accompany you or observe how you take an inquiry call or give a tour experience. Allow time to debrief afterwards so they can share concerns and questions. After you've modeled and coached several times with an individual, allow managers to lead and offer constructive feedback.

b. **Role Play:** Either individually or as a group depending on your team's comfort levels. There is no such thing as too much practice.

c. **In-Service:** Concentrate on one area of the sales process at your daily, weekly or monthly managers meetings. Time is limited so make the most of this opportunity by partnering with your Regional Director of Sales and Marketing in advance for help with strategies.

d. **Concierge Training:** This important training is now available through your Regional Director of Sales and Marketing and the Sales Training department. There is even a DVD to support the training and it is a must see for your Concierge. Make sure you have previewed the information prior to introducing it. A best practice is to present it to your entire staff.

e. **Back Up Team Connections Form-Short Version:** This is available on E&Me and is great for those folks who may struggle with the longer Connections form. This is also the best tool to teach to anyone who might answer the phones in the evenings, early morning hours, or weekends. Again, teach and train it by modeling correct usage of the form for the entire team, then let them practice.

For More Information...

- Check out the Sales Tip titled *"Back Up Connection Form"* on E&Me
- Consult your Regional Director of Sales and Marketing for additional tools and training support

BACK UP TEAM TOOLS & SYSTEMS

Big Picture

Occupancy growth is a team effort and in order to support the Back Up Team in your community, Emeritus offers you several tools and systems that you can easily utilize. As a Community Relations Director (and with the help of your Executive Director), you'll be helping to manage an agreed upon process to provide your team with a simple plan that includes accessible and accurate information.

Understanding Emeritus-Speak:

Back Up Team: Refers to associates at your community who have been identified as having sales skills and a willingness to assist with the sales process in the absence of the Community Relations Director (CRD). They are trained to a higher level in our sales process than your general line staff and usually consist of a minimum of three associates. These may be department heads or line staff – it will depend on what and who works well in this role in your individual community.

As the CRD, you will provide a short in-service each month to the entire staff at the all-staff meeting on general sales skills. This may consist of a 10 minute in-service on how to greet people who come into your community, how to answer the phone, etc. However, just because an associate has been trained on a general sales skill at the all-staff meeting does not mean that they are qualified to be a member of you Back Up Team. That requires additional training.

Our Expectations

In keeping with the Emeritus philosophy of Safely Somewhere where every inquiry is treated like a 9-1-1 call for help, it is expected that as Community Relations Director you will provide the appropriate tools, training and information to your Back Up Team so that they can execute great inquiry calls and tour experiences. As the sales expert in your community, all inquiries and tours should be handed off to you when you are available in the community. Your Back Up Team is to be trained to handle all inquiries and tour experiences that occur when you are out of the building or working with another inquiry. It's important to have a plan in place that all Back Up Team members are aware of so occupancy efforts don't come to a screeching halt when you are unavailable. One of the most important things you can do is to establish a system that determines who will take those inquiry calls or tours.

Back Up Team Triage

Here's how it works. Each day at Stand Up a list of managers "three-deep" is posted and communicated to all key personnel regarding who to contact if an inquiry call or tour comes into the community and the Community Relations Director is not available. Individuals that have several commitments or who are going to be out of the building should not be on the triage list for that day. Names on the list will change every day depending upon the Community Relations Director's external sales appointments and

the availability of trained Back Up Team members. The triage list will also address who will handle those important Internet Inquiries and who's on deck to cover lunch breaks.

The key to a successful daily triage team is NOT deciding who goes on the list – that's the easy part. The key is *COMMUNICATING* that list to everyone on your staff. How do you do this? One best practice is to have the entire staff attend daily Stand Up meetings. Another is for each department head to post the list by all of the phones. If you have a concierge, then that person needs a list and really needs to attend Stand Up every day.

Tools for Success

Understanding and practicing your triage team is only the first step in making sure that your Back Up Team is ready. The next step is to provide your team with the necessary tools and training so they are prepared to take an inquiry call or give a tour.

- **Connections Forms** should be available at every department head's phone. Don't forget the Concierge or any other key sales players that you have identified and trained as support. This will be different in every community and will depend on your line staff's willingness and skill to help in the sales roll. The recommended Connections Form for line staff to use is the "Inquiry Form Connections: Back Up Team – short version" found in the library on E&Me. This is also the best form to have located at each phone. If you have a department head on your Back Up Team who is skilled at using the longer inquiry Connections Forms, then make sure that they have copies of that form. Remember – you can't just put a stack of forms at each phone and expect great results! You will need to spend time training your entire staff on how to use the short form. You can do this at the all-staff meeting each month and it should definitely be a part of your new employee orientation.
- **Collateral** must be available and stocked at all times in the Family Room, Closing Room or Model Apartment. Encourage your team to use these discovery rooms to build relationships and share information with potential residents as opposed to leaving brochures at the Concierge desk or in the front office where they can be handed out without receiving any information about the customer and without starting to establish that important relationship.
- A **Community Fact Sheet** is available on E&Me and is a wealth of information for those individuals who may not be as comfortable presenting community information off the top of their head. It covers basic information regarding your community like where the Model Apartment is, available apartments, basic rate information etc. You and your Executive Director will need to determine how and when the information is updated as part of your back up strategy.
- **Priority Reservation Agreements** are available and each back up team member has been trained and is comfortable using them. These can be found on E&Me.
- Separate **Rate Information** needs to be available as well, should our customer ask for rates on a specific apartment size. This information should be available with the marketing collateral so if there are any questions they can be

answered privately. Please ensure your teams are comfortable and understand how our rates work.

- **Back Up Team binders** should be provided to each member of your triage team. It is recommended that you purchase binders that zip at your local office supply store. The binders should include the following:
  - List of rent-ready apartments
  - List of model apartments
  - Connection forms - assorted
  - Rate sheets
  - Level of Care information
  - VA Aid & Attendance information
  - ElderLife Financial information
  - Friendship Suites information
  - Priority Reservation Agreements
  - Extra paper
  - Pen/pencil
  - Calculator
  - Tape measure
  - Model room keys

Again – you can't just hand them a binder and tell them to go and do! You must train them on the materials that are inside.

Communication and Documentation

Now that you have a plan in place and have provided the appropriate information to your Back Up Team with training, you will need to figure out how the gathered information will be communicated to everyone (especially you as the Community Relations Director), and how that information will be documented. Each community is different but a successful Back Up Team system will ensure that the Community Relations Director receives the inquiry forms, additional discovery information or Priority Reservation Agreement in a fast and timely manner. This will enable you to start your active follow-up and build your relationship with the future resident. As the CRD, it is your responsibility to see that the information gathered is consistently entered into You've Got Leads.

For additional information...

Please contact your Regional Director of Sales and Marketing.

THE MARKETING BUDGET

Big Picture

As a Community Relations Director you will be balancing both the Internal and External Sales and Marketing program for your community. Since there are costs associated with the effort to grow occupancy, you will be presented with a Marketing Budget. Your marketing budget will be monitored on a community level by the Executive Director and regionally by your Regional Director of Sales and Marketing.

Our Expectations

The approved marketing budget will be communicated to you by your Executive Director and it is an Emeritus expectation that you will abide by those predetermined figures by managing your departmental expenses appropriately. In addition, every week you will record all expenditures on a *Spend Down Sheet* which you will deliver to your Executive Director at the time specified by him/her.

Spend Down Sheets

Spend Down Sheets are found on E&Me and are completed by you every week. Your spend down collectively tracks a month's expenditures at a time. Your Executive Director and Business Office Director have access to your budget and will communicate what your allotted budget is for the General Ledger codes that fall under your job description. It is your responsibility to monitor how much you spend and make sure that you stay within those financial guidelines.

Additionally, you will need to keep receipts from purchases (copies for your records, originals taped to a blank sheet of paper and turned into the Business Office Director for reconciliation). Some categories in your budget such as "advertising" are actually fixed amounts determined by Seattle and any additions or adjustments must be initiated regionally and approved both divisionally and by Seattle. Some items are charged to Marketing routinely such as the Community Activity Calendar. Communicate with your Executive Director and Activities Director to ensure you are receiving a suitable quantity of calendars for use in marketing and be on the lookout for the monthly invoice so you can accurately track that expense.

At times you and your Executive Director will request approval for a marketing expense that will exceed your budget. Be prepared with estimated costs or bids for any proposed purchases (you will generally be asked to shop at least three different vendors) and provide information about what you hope to gain from the increased expense. It is up to the discretion of the regional and divisional team to grant approval.

P-Cards

Upon employment as a Community Relations Director with Emeritus, you will be asked to complete paperwork for a ***P-Card***. This card is your work credit card. Review your required purchases with your Executive Director, save your receipts and stay within your budget to remain in good standing.

For Additional Information...

Contact your Executive Director, Business Office Director, Regional Director of Sales & Marketing or Regional Director of Operations.

You can also check out the following links:

- Spend Down Sheet
- PCard Policies and Procedures Manual

DAILY, WEEKLY, AND MONTHLY REPORTS

Big Picture

There are several reports that are available to a Community Relations Director (CRD) that help you to manage and drive your community's occupancy growth. The reports that you'll need to become most familiar with are available through You've Got Leads, E & ME, the Seattle office or may have been Best Practices that have been adopted and modified to support occupancy efforts. All of the various reporting tools were designed with one goal in mind - enable the user to manage occupancy efficiently, accurately and pro-actively.

Our Expectations

Community Relations Directors are expected to understand, utilize and manage appropriately the various occupancy reports available to them. You will assist the Executive Director and your community marketing team by helping to provide accurate occupancy information and communicate any discrepancies in a timely manner so the appropriate team members can make any necessary changes. You will partner with your Executive Director and other key staff <u>*daily*</u> to deliver a uniform message to your team as to the importance of growing your census and living that sense of urgency that assisted living sales demands.

Reporting Tools

Daily

Stand-Up Report-
Found on ***You've Got Leads***, it shows summary and detailed information regarding:

- Move-Ins and Move-Outs for the current month and next month,
- Deposits without a scheduled Move-In,
- Hot Leads
- Whiteboard Leads, and
- Residents on the Care Log (Residents at jeopardy of leaving the community for various reasons).

The Stand-Up Report is utilized at each Stand-Up or Morning Meeting.

Stand-Up/Morning Meeting-
Held in your community everyday at an agreed upon time and location. Department head team attends – in some communities the entire staff that is on-duty attends (please consult with your RDSM for regionally specific guidelines.) The focus is on occupancy to include the use of the *Safely Somewhere Board (your Whiteboard)*, budgeted versus actual units and residents, and use of the Daily Stand-Up Report.

Weekly

Occupancy Reporting Meeting (O.R.M.) –
This is a best practice used by some Regional Directors of Sales & Marketing and their CRD's to strategically manage any occupancy reporting errors in a timely fashion. A meeting is held once a week after the Weekly Occupancy Report has been released, usually Tuesday afternoons or Wednesday mornings at a regionally specific time. Attendees include the Community Relations Director, Business Office Director, Resident Care Director and the Executive Director.

Example: Occupancy Reporting Meeting

Here's how it works...every week we have O.R.M.(Occupancy Reporting Meeting) on Tuesday. At 4pm Tuesday the BOD, ED, CRD and RCD gather to confirm all of the occupancy reporting for accuracy and to hopefully catch any errors. Here's what everyone is responsible for bringing:

- BOD-Rent Roll
- ED-Occupancy Snapshot
- CRD-Daily Stand Up Report/MIMO and Community Activity Report
- RCD-Level of Care info (budget vs. actual)

The meeting should last about a half an hour. Teams need to keep in mind this is not "Stand Up" but more a system of checks and balances with reports to make sure everyone is on the same page. Teams will need to make arrangements ahead of time for coverage for any walk-in tour experiences or issues that may arise. Please let your team know (including your Concierge/Receptionist) that when the Regional Team member calls to join your meeting to please put them through immediately!

We really work off of the Daily Stand Up Report/MIMO as the "guide" and the team uses all reports to ensure unit values, names/apartments, dates, levels of care, transfers and stop billing dates are all correct. They are all answerable to one another for the information covered.

Weekly Occupancy Report
Sent from the Seattle office at the beginning of each week (a Preliminary Occupancy Report is sent out every Monday that allows you sufficient time to report any discrepancies). Review with your Business Office Director, Resident Care Director and Executive Director.

Community Activity Report –
Found on E&Me in: Reports/Your Community Name/Occupancy

Access the appropriate week's information on confirmed move-Ins, move-outs, unit values and stop billing dates. Please remember that this report does not include transfers in your community so please partner with the Business Office Director or Executive Director to confirm those internal moves.

Monthly

Wildly Important Goal (W.I.G.) -
Template found on E&Me under: Library/Sales and Marketing/Forms/General Forms

This tool will let you set a specific occupancy goal that will allow you to work with your Executive Director and Regional Director of Sales and Marketing to identify any barriers and then together form an action plan to reach a mutually agreed upon goal. Your goal needs to be specific, time-activated and most importantly, shared with your team on both a community and regional level.

Six Month Rolling Trend -
released by the Seattle office, this report contains the past rolling six months of move-ins, move-outs and net gain. It will enable you to strategically plan your occupancy focus based on trends in your community and will allow you to more efficiently cover for increased or decreased move-ins or move-outs.

For Additional Information:

Please contact your Regional Director of Sales and Marketing.

Check out these links:

- WIG Template

GLOSSARY OF EMERITUS SALES & MARKETING TERMS

Big Picture

Here's a guide to the acronyms you'll hear in the Emeritus workplace.

Term or Acronym	Definition
30- Day Sales Plan	Detailed, time activated schedule or plan of all sales and marketing activity for you and your community.
9-1-1- Call	Emeritus philosophy that every inquiry call or walk in to a community that is to be handled like a 9-1-1 emergency call for help.
Acuity	The amount of care or assistance with ADL's will determine if a resident is high acuity (requiring a great deal of care) or low acuity (requiring little care).
AD	Activities Director
ADC	Adult Day Care/Center that provides daytime programming for individuals with Alzheimer's or some other form of dementia
ADL's	Activities of Daily Living such as bathing, grooming, medication management, reminders, etc.
Admissions Director	Individual who coordinates the "admittance" process of a resident/patient into a healthcare community.
ADU	Average daily occupied units in your community
Advance Directive	Instructions given by individuals specifying what actions should be taken for their health in the event that they are no longer able to make decisions due to illness or incapacity
Aid & Attendance VA Benefit	The Veterans Administration provides a benefit for assisted living expenses to qualifying veterans dependent upon annual income and other criteria
AL	Assisted Living – a community that provides supervision with activities of daily living and monitors resident activities to help assure health, safety and well being while promoting an environment of dignity and independence.
Alzheimer's Association	Non-profit voluntary health organization which focuses on care, support and research for Alzheimer's disease.
Alzheimer's Disease	Most common form of dementia. Incurable, degenerative and terminal disease with symptoms that range from memory loss, confusion, irritability, aggression and loss of bodily functions, depending upon the stage of the disease.
APFM	A Place For Mom – referral source that has a partnership with Emeritus. Works with future residents to recommend assisted living communities based on the customer's preferences.
APS	Adult Protective Services – Social services provided to abused, neglected or exploited older or disabled adults. Typically administered by local or state regulatory departments.
Assistive Devices	Wheelchairs, walkers, scooters, canes, etc.

Back Up Team	Staff members (other than the Community Relations Director) responsible for the continued occupancy growth efforts in your community
BOD	Business Office Director
BP	Blood pressure
Brittle Diabetic/Sliding Scale	Individual with a form of diabetes requiring continual blood sugar monitoring, diet management and insulin injections needed at a moments notice
Calendar Listing	Your community event listed in a newspaper in advance of the actual scheduled date of event, most often a free service
Case Manager	Most often a nurse or social worker who provides assessment, planning facilitation and advocacy options for individuals with health needs. Normally located at hospitals and rehabilitation centers.
CCRC	Continuing Care Retirement Community providing independent living, assisted living and skilled nursing care on one campus. Usually requires a "buy in" fee.
Census	The number of occupied units and or residents in your community
CHF	Congestive heart failure. A condition that occurs when a problem with the structure or function of the heart impairs its ability to supply sufficient blood flow to meet the body's needs.
Close	Final step of the sale. Activities include receipt of check and signed Resident Agreement
Closed Lead	A lead designated as "unable to advance" only after all avenues of follow up, relationship building and forms of contact have been exhausted. Please consult with your Regional Director of Sales and Marketing for support and guidelines prior to closing any lead.
CNA	Certified Nurse's Aide
COC	Chamber of Commerce - business network comprised of local business owners that advocate on behalf of their business community.
COF	Choice Option Fee - one time only community entrance fee due at time of resident agreement signing. Gives customer the option of a lower monthly rent fee by paying a higher up-front Choice Option Fee.
Collateral	Marketing materials such as brochures, rack cards, floor plans, pamphlets, etc, communicating a community's specific information
Community Activity Report	Found on E&Me – report with recorded move-ins/move-outs with specific date and unit value information according to entries made into E-site
Community Fact Sheet	Found on E&Me - sales tool that provides the "vital statistics" of your community and is updated weekly, usually by CRD or Concierge. Great tool for Back Up Team binders.

Community Fee	One time fee due at signing of resident agreement that covers nursing evaluation, individualized and personalized care plan, apartment preparedness, staff orientation and administrative fees. Amount varies by community.
Community Outreach	The sales and marketing efforts you make outside of your community. Designed to build relationships and gain referrals.
Companion Living/Friendship Suite	Two residents sharing the same apartment which allows residents to stretch their assets and enjoy a more social living environment.
Competitive Analysis	Detailed information regarding our competitors and local healthcare communities that is updated every quarter by the CRD.
Compliments/Competitors	Other assisted livings or anyone who is considered to be another option for our customers.
CON	Certificate of Need – a legal document issued by a federal or state regulatory agency with authority over an area which affirms that a proposed acquisition, expansion, or creation of a facility falling under that authority is required to fulfill the needs of a community.
Connections Forms	Emeritus forms developed to build relationships with potential residents/family members/friends using discovery questions and providing a format for consistent documentation.
Conversion Ratios	Measurement of CRD's success at advancing the sale. Example: Inquiry to Tour Conversion Ratio means that the higher this ratio, the better the CRD is at getting the customer to come in for a tour after the initial call-in for information.
CRD	Community Relations Director
CTM	Collaborative Team Management – coordinated team effort by the Executive Director, Resident Care Director and Community Relations Director to lead the community by making informed decisions as one unit.
CVA	Cerebrovascular Accident, or Stroke - rapidly developing loss of brain function due to a disturbance in the blood vessels supplying blood to the brain. Leading cause of adult disability in the United States.
D/C	Discharge – an individual's release from a healthcare community.
Daily Stand Up Report	Found on You've Got Leads - highlights your community's move-ins/move-outs (scheduled or actual), hot leads/whiteboard leads, care log information regarding residents that may be possibly discharged, deposits on hand etc. used daily at stand up.
Dementia	The progressive decline in cognitive function due to damage or disease in the body beyond what might be expected from normal aging.
Department of Aging	Local and state organization that provides services and support for people aged 55 and over and for families supporting older family members.

Diabetes	A disease resulting in abnormally high blood sugar levels due to diminished production of insulin.
Direct Sales	Sales involving person to person contact
Discharge Planner	Individual at a hospital or rehabilitation center who deals with discharges. Often times this is a social worker, but can be a case manager or admissions person who manages the process. Functions as the main liaison between the resident/patient/family member and the facility.
DNR	Do not resuscitate – legal document designating pre-planned medical direction if a person becomes incapacitated and is unable to make decisions for themselves.
Drop By	A quick unplanned visit with the goal of scheduling a one-on-one with a referral source
Durable Power of Attorney	Healthcare power of attorney and advance directive which empowers a proxy to make healthcare decisions for a "grantor" up to and including terminating care.
E&Me	Emeritus and Me - Emeritus employees' online resource center
ED	Executive Director
Elder Law	Area of legal practice that places emphasis on those issues that effect the growing aging population such as estate planning, Medicaid/disability and guardianship
Elder Law Attorney	Lawyer specializing in the practice of Elder Law
ElderLife Financial	Financial group whose partnership with Emeritus presents residents and family members with financial options to facilitate a move into your community.
Emeritus Brain Health	Unique Emeritus Alzheimer programming founded by Dr. Paul Nussbaum.
External Sales	Sales and marketing efforts made outside of your assisted living community.
Family Room/Closing Room	Private room or apartment in your community dedicated to discussion, discovery and the offering of solutions to your customers needs. Most often this is your model apartment.
First Impressions	The overall initial impact of your community to our customers, residents, referral sources, families, vendors and staff
Follow Up	Contact made by phone, e-mail, written or in person designed to advance the sale and relationship.
Geriatric Case Manager	Case managers specializing in patient population of individuals 65 or older.
Geriatric Psychiatrist	Psychiatrist specializing in the treatment of the senior population.
Geriatrician	Physician that specializes in the branch of medicine focusing on healthcare of the elderly.
GPGR	*Great People, Great Relationships* –Sales tool found on E&Me. Offers daily and monthly ideas and events to support the sales and marketing efforts of your community.

Guardian	A person who has the legal authority (and corresponding duty) to care for the personal and property interests of another.
HIPAA	Health Insurance Portability and Accountability Act – requires adherence to national standards in the electronic transmission of health data to ensure the data's security and privacy.
Home Care	Health care or supportive care provided in the patient's home by healthcare professionals.
Home Health Agency	Agency that provides healthcare or supportive care in the patient's home.
Home Visit/Off Site Visit	An in person meeting with a potential resident or family member to identify needs/wants, check on safety of potential resident and create a personable, memorable customer service experience. Does not always occur in the customer's personal home – may happen at another mutually agreed upon location.
Hospice	Groups or facilities providing palliative care through symptom relief and pain management to individuals at end of life. Uses Medicare part A benefit.
Hot/Warm/Cold Leads	Hot leads close in 30 days or less. Please contact your RDSM for regional guidelines on warm and cold leads
IL	Independent Living - active adult/senior communities requiring minimal support from staff.
Inquiry Call	Incoming phone call to a community where the purpose of the caller is to gather information regarding your community and assisted living in general. We treat these calls as a 9-1-1 call for help.
Internal Sales	All sales efforts completed within the community. Involves the closing of existing and incoming leads, as well as all follow up.
JTJ	Join Their Journey – Emeritus dementia and Alzheimer specific programming found in our Memory Care Neighborhoods.
Lead Bank	Leads and professional referral sources in your community's You've Got Leads database.
Level of Care	The degree of assistance with ADL's that a resident requires.
Living Will	A written statement of a person's healthcare and medical wishes. Does not appoint another person to make those decisions.
LOC	Level of Care
LPN	Licensed Practical Nurse
Marketing	Increases the number of interactions between potential customers and the sales team by using promotions, public relations and new sales channels. Goal is to drive more customers to the door.
MCD	Memory Care Director
MCN	Memory Care Neighborhood – specific area in your community dedicated to the care of the Alzheimer and dementia population that we serve. The neighborhood is a secure environment.

MD	Maintenance Director
Medicaid	US health program for eligible individuals and families with limited income and financial resources.
Medicaid Waiver	Varies by state. Health program that covers support and services not typically covered by Medicaid.
Medicare	An entitlement program funded entirely at the federal level. Provides health insurance program for individuals 65 or older, as well as people 65 and under with certain disabilities and people of all ages with end stage renal disease.
Medicare Part A	Provides coverage on hospital bills/hospice care.
Medicare Part B	Provides coverage on medical insurance.
Medicare Part D	Provides coverage for prescription drugs.
MOD Binder	Manager On Duty binder – contains various sales tools and information used by the manager on duty.
Model Apartment	Sample apartment that is tastefully fully furnished.
Move-In	An individual confirmed as paying rent for a specific apartment.
Move-In Fee	*See Community Fee*
Move-Out	An individual no longer financially obligated to pay rent for a specific apartment.
MOW	Meals on Wheels - food delivery to home bound seniors.
MS	Multiple Sclerosis – autoimmune disease that affects the central nervous system.
MSA	Multiple Sclerosis Association - non profit organization that supports individuals with MS and their family members by providing information and research.
Mystery Shop	Sales tool used by a designated shopper who calls or visits your community, acting as a potential resident or family member. Designed to test your sales skills, as well as the effectiveness of your back up teams.
New Resident Orientation Checklist	Tool used to make sure there are no gaps in information to/from the new resident in your community. Each department head receives and completes their individual checklist for each move-in. Helps to facilitate a seamless moving transition for the senior and family.
Non-Medical Care	Also called custodial care. Care that is provided by persons who are not nurses, doctors or other licensed medical professionals.
Nursing Evaluation	Evaluation performed by a nurse to determine the assisted living appropriateness and care needs of a potential resident. Also completed on a regular basis on in-house residents.
ORM	Occupancy Reporting Meeting – Best practice for ensuring accurate move-in, move-out projections. Held weekly with the ED, RCD, BOD, CRD and RDSM.
OT	Occupational Therapy - therapy that enables people to participate in the activities of everyday life.
P-Card	Purchasing Card – Emeritus credit card provided to designated department heads and dependent upon set spending limits and ED approval.
Phone Blitz	Team effort at coordinated phone follow up designed to generate next steps.

PINITO	Acronym for the goals and objectives of a sales call (P-person/referral, I-in service, N-new lead, I-intro to new lead, T-reciprocal tour, O-connect this person to other in our community).
POA	Power of attorney – can be medical or financial or both).
Preliminary Occupancy Report/Occupancy Report	Reports generated in the Seattle office and sent weekly and at end of month to track community/region/division/company occupancy.
Pre-Qualification Checklist	Tool used primarily by the CRD to gather preliminary health information for the Resident Care Director as to the appropriateness of a potential resident. This does NOT take the place of the required nurse evaluation.
Press Release	Emailed, faxed or hand delivered information to a media contact regarding an event in your community usually accompanied by photos and direct quotes.
Priority Reservation Agreement	Sales tool that requires a financial commitment from a potential resident or family member for a specific apartment. Allows signer the first right of refusal to that apartment. Completely refundable if they change their mind and decide not to move in with us.
PRN	As needed
PT	Physical Therapy - therapy to develop, maintain and restore maximum movement and functional ability throughout the lifespan.
RCD	Resident Care Director
RDO	Regional Director of Operations
RDQS	Regional Director of Quality Services
RDSM	Regional Director of Sales & Marketing
Referral Source	Any individual/group with the ability to refer potential residents or their family member to our community.
Rehabilitation Center	Short or long term care facility providing physical, occupational and other rehabilitative services after an illness or accident.
Relationship Profile	Hard copy of detailed information regarding our referral sources including a journal of our relationship growth and next steps with them.
Rent	Monthly cost without level of care fees for a specific apartment in your community.
Resident Agreement	Legal document outlining services a specific community provides to its residents such as amenities, cost, termination of said agreement, etc. Required for all residents of a community.
Respite Stay	Short term stay (usually less than 30 days) in a healthcare community/assisted living.
RN	Registered Nurse
Role Play	Training tool used to practice and model sales behaviors with the purpose of improved performance, either one-on-one or as a group.
Royal Treatment	Emeritus philosophy of creating meaningful and personalized customer service experiences for potential residents, family members, referral sources, residents or staff.

Safely Somewhere	Emeritus philosophy of staying in touch with every inquiry to help them find the safest solution available, even if it's not with us
Safely Somewhere Board/Whiteboard	Emeritus tool to record and track progress of 5-10 potential residents (i.e. whiteboard leads). These leads have been designated as "projects" meaning that they are going to take the full effort of your entire team to advance them to a close.
Sales	Activities including generating and closing leads, educating prospects, finding needs and satisfying wants of consumers appropriately. Successful sales at Emeritus turns potential residents into actual residents.
Sales Call	A scheduled "one-on-one" appointment with any referral source with the goal of building/strengthening a relationship that will result in referrals/partnerships/in-services.
Sales Pipeline	A measurement of where future residents are in the Emeritus sales process. Pipeline starts with "initial inquiry" and goes all the way to "closed".
Sales Tool Box	Preapproved sales incentives available at the community level. The CRD or ED can offer one item from the Sales Tool Box to potential residents or family members, as needed to close the sale.
Seattle	Location of the Emeritus headquarters.
Senior Center	Community center where members gather for group activities and social support.
Senior Housing Net	Internet based referral source
SMEW	Strategic Market Experience Week - Week long, in depth evaluation and strategizing session to help you better understand your local senior living marketplace. Involves the entire management team and regional participants. Allows you to identify and improve strengths, potential, systems and best practices in your own community.
SNAP	SNAP For Seniors - referral source that has a direct partnership with the Alzheimer Association and refers future residents who have memory care needs.
SNF	Skilled Nursing Community - facility that can provide both long term and short term rehabilitative services to it's residents that require constant nursing care and have significant deficiency with regards to ADL's.
Social Services	Individuals or groups committed to advocating on the part of the resident or client by enhancing their quality of life through interventions, support programs, etc.
Social Worker	Individual with a bachelors or masters in social work. Works in hospitals and rehabilitation facilities to support and facilitate the discharge plans of the patient.
Spend Down Sheet	Tracks departmental expenditures
Stand Up/Morning Meeting	Daily, occupancy driven meeting hosted by the CRD and ED. Lasts no more than 15-20 minutes and attended by all managers and key staff.
Stop Billing Date	The last paid day in our community by a resident who has been discharged.

Talent/Model Release Form	Tool granting community permission to utilize a resident's picture or comments in the media.
Time Activated Next Step	A next step with a specific time and date. Recorded in a planner (paper or digital) and includes planning/preparation time.
Tour Experience	Presenting and showing your community to a potential resident, family or professional. The experience should be directed to their needs and interests and should not be the "tour route" routine.
Transfers	Apartment/unit movement within your community by a resident.
Unit Manager	A nurse who manages a healthcare delivery setting where patients with similar needs are grouped to facilitate the delivery of care by healthcare professionals.
Unit Value	The value of an apartment - either one full unit (1) or half a unit (.5). On rare occasions, can be a triple or (.33)
Vigilan	Computer program used in all Emeritus communities to evaluate and monitor levels of care in that community.
VPO	Vice President of Operations for a division
VPQS	Vice President of Quality Services for a division
VPSM	Vice President of Sales & Marketing for a division
Walk In	An unscheduled tour experience by a potential resident or family member.
Walk Through	Performed daily by the CRD. Involves walking the community in order to make note of community opportunities and facilitate exceptional First Impressions.
White Board Leads	These are the 5-10 leads on the Safely Somewhere Board that your team is committed to closing or advancing to the next step. They are designated in YGL as "Whiteboard" status.
WIG	Wildly Important Goal – monthly, 30-day marketing plan that CRD creates to focus on specific sales goal for that month. Used to prioritize activities that will have the biggest impact on occupancy growth.
YGL	You've Got Leads – web-based lead management system utilized daily by the CRD.

BACK UP TEAM PROTOCOL

Big Picture

As a Community Relations Director you'll be maintaining a balance between external and internal sales and marketing. Towards that end it will be critical to maintain a strong closing focus with your Back Up Team while you keep the referrals flowing into your community. The key to making all of this work will be in your ability to recognize where there are areas of opportunity with regards to the sales process and by providing initial and on-going training/coaching for your team.

We define our Back Up Team as anyone who has been trained to work with customers on potential sales when the Community Relations Director or Executive Director are out of the community/unavailable. This will be different for different communities. In some Emeritus communities, the Back Up Team is the entire management team. In others, it is a mixed group of managers and line staff who have been hand-picked for their skills and willingness to work in the sales arena.

Our Expectations

It is an Emeritus expectation that all department heads are trained on the following:

- taking an inquiry call,
- providing a tour experience, and
- being able to secure next steps that will advance the sale. Examples of next steps include:
    - Scheduling a home visit,
    - Scheduling a tour experience,
    - Scheduling the nursing evaluation,
    - Collecting a Priority Reservation Agreement, or even
    - Closing the sale by securing a commitment to move in.

As Community Relations Director it is expected that you will partner with your Executive Director to use a variety of tools and systems to train and help maintain your Back Up Team's effectiveness.

Evaluating Your Back Up Team

Evaluating your team is the first step in understanding if your Back Up Protocol is in place, allowing you to work smarter not harder. Listed below are several tools and systems you can use as part of a successful plan for occupancy growth. You will want to partner with your Executive Director during this evaluation process for their support and advice.

a. **Manager Interview:** This is simply sitting down with your fellow department heads one on one to ask what portions of the sales process they are comfortable with and which areas they would like additional training. You should continue to periodically interview managers to ascertain the effectiveness of your training and coaching. A very important reminder: don't forget to celebrate their successes!

b. **Shadow Your Teammates:** Partner with Managers and key players to see first hand how they take a phone Inquiry, give a tour experience or close a sale. Offer the appropriate training as needed and continue to support their efforts.

c. **Utilize You've Got Leads (YGL) Reports:** Target your back up training efforts in the areas where you and your team have the opportunity to make the most impact. Utilize **You've Got Leads** reports such as the *Conversion Trend Summary* and *Sales Pipeline* reports to identify your community's sales ratios. Your team may be exceptional at converting tours to closes, but have a lot of opportunity getting people to come into the community after taking an inquiry. Strategize on where you need to spend the most time training.

d. **Mystery Shop Your Community:** Personally call the community at different times of the day and on the weekend. Use the *Mystery Shop Guidelines Tool* (Shannon – link?) found on E&Me to help prepare you for the call.

e. **Auditing Inquiry Forms:** Always audit team members' inquiry skills by reviewing how well they utilized the Connections Forms. Do you see any patterns with certain managers? Are there large gaps in information? Did they ask all of the questions? Is there an absence of time activated next steps?

f. **Follow Up:** As a Community Relations Director you'll be following up with all inquiries so make sure you are using Emeritus tools such as the *Follow Up to an Experience form* (Shannon – link?) found on E&Me.

g. **The Concierge:** This individual is hugely important in regards to the first impression that your community makes on an inquiry. They are often the first person to respond to inquiry calls and scheduled or walk in tour experiences (see Concierge job description on E&Me). You will want to make sure you are partnering with your Executive Director to make sure the most qualified individual is placed in this role. Be sure to include the Concierge in all of your team training.

Training the Back Up Team

Making sure the Back Up Team is prepared and executing their role correctly is an ongoing process. Here are some suggestions to ensure your training is successful.

a. **Model Sales Behaviors:** Make sure team members are seeing the "Expert" in action. Schedule time as necessary so they can accompany you or observe how you take an inquiry call or give a tour experience. Allow time to debrief afterwards so they can share concerns and questions. After you've modeled and coached several times with an individual, allow managers to lead and offer constructive feedback.

b. **Role Play:** Either individually or as a group depending on your team's comfort levels. There is no such thing as too much practice.

c. **In-Service:** Concentrate on one area of the sales process at your daily, weekly or monthly managers meetings. Time is limited so make the most of this opportunity by partnering with your Regional Director of Sales and Marketing in advance for help with strategies.

d. **Concierge Training:** This important training is now available through your Regional Director of Sales and Marketing and the Sales Training department. There is even a DVD to support the training and it is a must see for your Concierge. Make sure you have previewed the information prior to introducing it. A best practice is to present it to your entire staff.

e. **Back Up Team Connections Form-Short Version:** This is available on E&Me and is great for those folks who may struggle with the longer Connections form. This is also the best tool to teach to anyone who might answer the phones in the evenings, early morning hours, or weekends. Again, teach and train it by modeling correct usage of the form for the entire team, then let them practice.

For More Information...

- Check out the Sales Tip titled *"Back Up Connection Form"* on E&Me
- Consult your Regional Director of Sales and Marketing for additional tools and training support

BACK UP TEAM TOOLS & SYSTEMS

Big Picture

Occupancy growth is a team effort and in order to support the Back Up Team in your community, Emeritus offers you several tools and systems that you can easily utilize. As a Community Relations Director (and with the help of your Executive Director), you'll be helping to manage an agreed upon process to provide your team with a simple plan that includes accessible and accurate information.

Understanding Emeritus-Speak:

Back Up Team: Refers to associates at your community who have been identified as having sales skills and a willingness to assist with the sales process in the absence of the Community Relations Director (CRD). They are trained to a higher level in our sales process than your general line staff and usually consist of a minimum of three associates. These may be department heads or line staff – it will depend on what and who works well in this role in your individual community.

As the CRD, you will provide a short in-service each month to the entire staff at the all-staff meeting on general sales skills. This may consist of a 10 minute in-service on how to greet people who come into your community, how to answer the phone, etc. However, just because an associate has been trained on a general sales skill at the all-staff meeting does not mean that they are qualified to be a member of you Back Up Team. That requires additional training.

Our Expectations

In keeping with the Emeritus philosophy of Safely Somewhere where every inquiry is treated like a 9-1-1 call for help, it is expected that as Community Relations Director you will provide the appropriate tools, training and information to your Back Up Team so that they can execute great inquiry calls and tour experiences. As the sales expert in your community, all inquiries and tours should be handed off to you when you are available in the community. Your Back Up Team is to be trained to handle all inquiries and tour experiences that occur when you are out of the building or working with another inquiry. It's important to have a plan in place that all Back Up Team members are aware of so occupancy efforts don't come to a screeching halt when you are unavailable. One of the most important things you can do is to establish a system that determines who will take those inquiry calls or tours.

Back Up Team Triage

Here's how it works. Each day at Stand Up a list of managers "three-deep" is posted and communicated to all key personnel regarding who to contact if an inquiry call or tour comes into the community and the Community Relations Director is not available. Individuals that have several commitments or who are going to be out of the building should not be on the triage list for that day. Names on the list will change every day depending upon the Community Relations Director's external sales appointments and

the availability of trained Back Up Team members. The triage list will also address who will handle those important Internet Inquiries and who's on deck to cover lunch breaks.

The key to a successful daily triage team is NOT deciding who goes on the list – that's the easy part. The key is *COMMUNICATING* that list to everyone on your staff. How do you do this? One best practice is to have the entire staff attend daily Stand Up meetings. Another is for each department head to post the list by all of the phones. If you have a concierge, then that person needs a list and really needs to attend Stand Up every day.

Tools for Success

Understanding and practicing your triage team is only the first step in making sure that your Back Up Team is ready. The next step is to provide your team with the necessary tools and training so they are prepared to take an inquiry call or give a tour.

- **Connections Forms** should be available at every department head's phone. Don't forget the Concierge or any other key sales players that you have identified and trained as support. This will be different in every community and will depend on your line staff's willingness and skill to help in the sales roll. The recommended Connections Form for line staff to use is the "Inquiry Form Connections: Back Up Team – short version" (Shannon – link?) found in the library on E&Me. This is also the best form to have located at each phone. If you have a department head on your Back Up Team who is skilled at using the longer inquiry Connections Forms, then make sure that they have copies of that form. Remember – you can't just put a stack of forms at each phone and expect great results! You will need to spend time training your entire staff on how to use the short form. You can do this at the all-staff meeting each month and it should definitely be a part of your new employee orientation.
- **Collateral** must be available and stocked at all times in the Family Room, Closing Room or Model Apartment. Encourage your team to use these discovery rooms to build relationships and share information with potential residents as opposed to leaving brochures at the Concierge desk or in the front office where they can be handed out without receiving any information about the customer and without starting to establish that important relationship.
- A **Community Fact Sheet** (Shannon – link?) is available on E&Me and is a wealth of information for those individuals who may not be as comfortable presenting community information off the top of their head. It covers basic information regarding your community like where the Model Apartment is, available apartments, basic rate information etc. You and your Executive Director will need to determine how and when the information is updated as part of your back up strategy.
- **Priority Reservation Agreements** (Shannon – link?) are available and each back up team member has been trained and is comfortable using them. These can be found on E&Me.
- Separate **Rate Information** needs to be available as well, should our customer ask for rates on a specific apartment size. This information should be available with the marketing collateral so if there are any questions they can be

answered privately. Please ensure your teams are comfortable and understand how our rates work.

- **Back Up Team binders** should be provided to each member of your triage team. It is recommended that you purchase binders that zip at your local office supply store. The binders should include the following:
    - List of rent-ready apartments
    - List of model apartments
    - Connection forms - assorted
    - Rate sheets
    - Level of Care information
    - VA Aid & Attendance information
    - ElderLife Financial information
    - Friendship Suites information
    - Priority Reservation Agreements
    - Extra paper
    - Pen/pencil
    - Calculator
    - Tape measure
    - Model room keys

Again – you can't just hand them a binder and tell them to go and do! You must train them on the materials that are inside.

Communication and Documentation

Now that you have a plan in place and have provided the appropriate information to your Back Up Team with training, you will need to figure out how the gathered information will be communicated to everyone (especially you as the Community Relations Director), and how that information will be documented. Each community is different but a successful Back Up Team system will ensure that the Community Relations Director receives the inquiry forms, additional discovery information or Priority Reservation Agreement in a fast and timely manner. This will enable you to start your active follow-up and build your relationship with the future resident. As the CRD, it is your responsibility to see that the information gathered is consistently entered into You've Got Leads.

For additional information...

Please contact your Regional Director of Sales and Marketing.

CLOSING THE SALE

Big picture

We close a sale when we secure a deposit for move-in. At Emeritus, we expect that there is some type of "close" with every interaction that you will have with your customer. Whether you are taking an initial inquiry, giving a tour experience, or simply doing follow-up, our standard is that you advance the sale by securing a next step. That next step is really a mini-close that is designed to bring you one step closer to the final close. Next steps might include scheduling a retour, scheduling a home visit, setting up the nurse evaluation, etc.

Our standards & process

We utilize three types of closes when we are ready to move someone in. They include the Assumptive Close, the Either/Or Close, and the Just Ask Close.

1. **The Assumptive Close**: The assumptive close uses words like "which, when, how and who." It assumes the sale has already been made and is great to use when your customer is giving you strong buying signals.

   Example: "Which day shall we schedule your mother's move-in?" Or, "When shall we set up the evaluation?"

2. **The Either/Or Close**: This close gives your customer a sense of control and choice by offering two possible options.

   Example: "Would you like to complete the paperwork required for move-in today or simply leave the deposit?"

3. **The Just Ask Close**: The just ask close is a close-ended question that can be answered with a "yes" or "no" and uses words like "shall, can, may and would."

   Example: "Would you like me to reserve the apartment we discussed for your mother?" Or, "Shall I go ahead and prepare for your mother's move-in?"

Exploring objections

Inevitably, we will come across the occasional barrier or objection when we get ready to close a sale. ***Remember – when an objection surfaces, what you are really hearing is an unanswered question.*** Our job is to help our customer voice those questions so that we can answer them and find just the right solution.

The easiest way to work with objections is to go back to your discovery phase. Remember when you started the sales process with this customer and you asked questions and delved deeper into what their real situation was? Uncovering objections is the same process!

1. Find the most important objection. We do this by first finding ALL the objections and then asking which is most important. Don't be defensive and watch your body language! Remember – you are there as part of the solution and you want to have all the facts available so that you can offer the best solution possible.
2. Refine the most important objection. Do this by asking open ended questions and discovering the "real" issue. Validate their feelings WITHOUT validating the facts.
3. Express the objection as a question. Use a question starter, such as "So what you really want to know is...", "You seem to be asking...", or "Are you asking..." Get a "yes" response.
4. Diffuse or Resolve with facts. This is where you offer the solution to that particular objection. If you can't resolve the situation with facts, diffuse the objection by using the feel, felt, found model.

   Example: "I can understand how you might <u>feel</u> that way, Mrs. Jones. Other families have <u>felt</u> the same way in the past. However, what they <u>found</u> was that once their mother moved into Emeritus at Training, she was actually living a more active life and had more friends to do things with than when she lived alone."

Closing tools

You have a variety of closing tools available to you. One of the best tools is the **<u>Priority Reservation Agreement</u>**. This gives your customer the opportunity to put a refundable deposit on the apartment that they want, with the right of first refusal

Another closing tool that is available to you is the **<u>Sales Tool Box</u>**. This is a kit of incentives that have been authorized by your Regional Team for your use in closing sales. **Understand that you can only use ONE incentive per move-in and that the incentive is used to help speed up the move-in process.**

For more information...

Consult your RDSM for additional practice and training on closing and securing next steps.

DAILY WALK THROUGH OF COMMUNITY

Big Picture

Your community needs to be prepared at all times to provide a tour experience to a future resident, family member or referral source. Ensuring that your office, Model Apartment/Family Room and the community at large is looking its best and most inviting is monitored and achieved by the Daily Walk Through.

Our Expectations

It is an Emeritus standard that you will help manage and maintain your office, Model Apartment/Family Room and all first impressions of your community. Each day you will ensure that these areas are clean, inviting, well maintained and you will communicate and partner with the Executive Director, fellow Department Managers and appropriate staff to achieve the desired effects.

The Office

The Community Relations Director's office is always a resource center for your Team. Depending upon where you host Stand Up and maintain and manage the Safely Somewhere Board, you'll need to provide a neat, clutter-free meeting environment. Remember to place curtains or have a system in place to protect the private information contained on your board (including community financial information). Keep sales collateral, brochures, move-in packets, Connections Forms and other sales tools in pre-determined locations that are easily accessible to your team when you are unavailable. There's nothing worse than having to search through piles of paper on someone else's desk! As a rule, always meet with referral sources, potential residents and family members in your Model Apartment or Family Room rather than in your office. It's more comfortable and inviting when sharing private and personal information.

The Community

You will start your day each morning by walking through your community prior to Stand Up. Imagine yourself as a potential guest. What do you hear, smell, see, feel and taste? Are there any areas in your building that need immediate attention? Check your Model Apartment and remember to do a walk-through of the outside areas – parking lot, entrances, dumpster area, etc. Make notes and share your observations with your team at Stand Up to ensure the correct person receives the information and has enough notice to make impact on those areas of opportunity immediately. Your Executive Director will follow up to make sure First Impressions are at their best.

The Model Apartment or Family Room

No one will be in the Model Apartment or Family Room as much as you, so make sure you are communicating to your fellow managers where you may need some support with its' maintenance. Ensure housekeeping is done regularly and the appropriate beverages and snacks are well stocked and in the refrigerator so you can serve them cold. Your Dining Services Director is a great resource if you need to order some basics or even develop a system to provide fresh, baked goods everyday. Any sales tools and support materials need to be stocked in the Model by you so that you and your team are always prepared. Future residents and their family members often end up wanting to rent the Model so be prepared to rent it.

For Additional Information:

- Please contact your Executive Director or Regional Director of Sales and Marketing
- Check out the following tools available on E&Me
  - Sales Tip – Model Apartment
  - First Impressions Book

EFFECTIVE FOLLOW UP

Big picture

Community Relations Directors are expected to spend a portion of their time each week executing effective follow up with prospective leads. Generally, follow up falls into the categories of call-outs, off site visits, mailings, etc. The main focus of follow up is on call-outs to our lead bank.

Our standards

CRD's are expected to make a minimum of 50 follow up phone calls each week. At Emeritus, we want your calls to be effective and not just "smiling and dialing". To help you become more effective, we have created follow up *Connections* forms that help to make your follow up calls more meaningful while advancing the sale to the next step. The standard is that you will use a follow up *Connections* form for every call that you make.

There are three follow up *Connections* forms available for your use:

- **After an Experience/Tour** – this form is used within 24 hours of the customer touring your community
- **Established Relationship** – this form is used for customers whom you have not been in contact with for a while. It is also a great form for new CRD's to use to introduce themselves to their lead bank.
- **Respite Conversion** – this form is for respites who are currently in-house or who have moved back home.

For a call to be considered effective follow up, it must meet the following criteria:

- It must be interactive – voice mail messages do not count as follow up!
- It is specific and personalized to the person you are calling. This means that you have prepared and read the notes from You've Got Leads.
- A next step is scheduled.
- It requires action on the part of the customer – they commit to a next step.
- Every follow up step in entered into You've Got Leads.

Our process

Prior to making any follow up calls, we have to plan what we want to get out of the call. The obvious answer is to learn more about the prospective resident's situation and what we can do to help move them along to an appropriate solution. The follow up Connections forms have a planning box located at the top where you can plan what next step you hope to secure by the end of the call.

We start all follow up calls by opening the call, disarming the customer and stating the reason for the call. We have a very specific and very effective script for doing this.

"Hello, ____________________. This is Sally Sales calling." **PAUSE**

Wait for a "yes?" answer.

"If you recall *(state a fact or recall an event)*." **PAUSE**

Wait for the "yes"... Or you can say

"I understand *(state a fact)*." **PAUSE**

Wait for the "yes"...

"Do you have a quick minute?" **PAUSE**

"Yes!"

"I would like to ask you a few questions *(state the reason for the call)*."

Once you have completed this, you can start working through the appropriate Connections form. Use the form to identify their needs and use active listening techniques. Just as with our initial inquiries, we ask open-ended questions after each question on the follow up form. *"Tell me more..." "What else should I know?" "Anything else?"*

Finally, when we have learned as much as we can, we advance the sale by securing a next step. This may be the next step that we pre-planned prior to making the call or it might be something completely different, depending on what you heard during the call.

ADVANCE the Sale

We move our customers towards a solution by advancing the sale to the next step. Some potential next steps might include:

A: Another staff member gets involved

D: Deliver a royal treatment or piece of communication in person

V: Visit, schedule a home visit or drop by

A: Another Tour Experienced scheduled

N: New lead – maybe they know the name of another person who might need our services?

C: Check – get the deposit. Use the Priority Reservation Agreement

E: Evaluation – schedule an evaluation with your nurse

or

E: Event – invite them to a community event

Voice Mail

Sometimes you do have to leave a voice mail message. While this doesn't count as effective follow up because it is not interactive, it is important to let someone know that we are concerned about them and their situation. Emeritus has a few standard voice mail directions:

- Call three different times before leaving a voice mail message. Try to call at different times of the day. On the fourth try, leave a well-planned voice mail message.
- Avoid rambling
- Repeat your name and contact number
- Be sincere and personal, remind the customer of your previous connection.

For a sample voice mail script, see the *Quick Guide* for this topic.

For More Information...

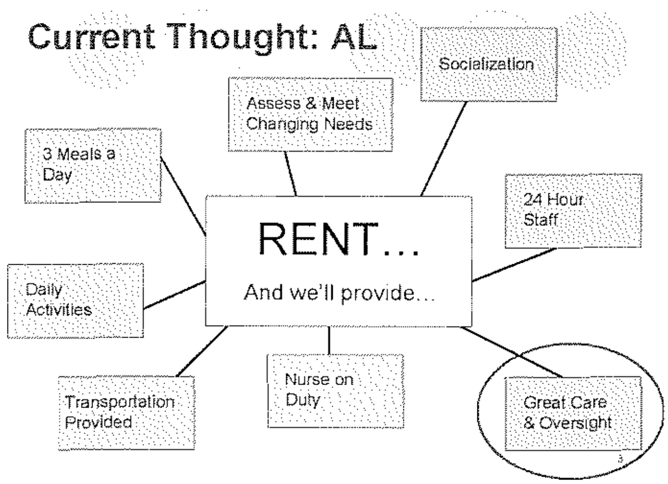
- Check out the Quick Guide – Follow Up Calls, located in the E&Me library. Consult your RDSM for additional practice and training on the *Connections* forms.

EMERITUS' *CORE* PHILOSOPHY

Big picture

Emeritus embraces a concept in our sales process known as "C.O.R.E." which stands for Care Over Real Estate. The CORE concept is a paradigm shift from how most senior living companies approach their sales process.

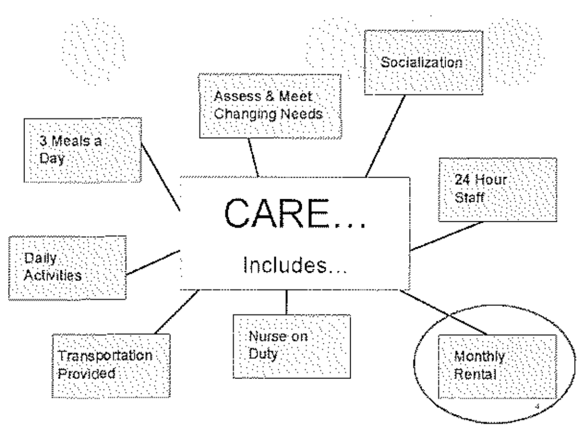
Here's an example of the current thought in the industry:



This thought process maintains that your main objective is to rent an apartment and everything else – *including care* – is an added benefit.

In reality, we know that our customers come to us because they need help with some aspect of care. Care is the most important thing and the number one question in their head is "How are you going to take care of this person who is so precious to me?"

To address that question head on and to make the sales process about them and their needs, we need to change how we approach the sale to this:



Every step of the Emeritus sales process is focused on how we are going to care for our customer and their loved one. Care Over Real Estate.

Our expectations

Executive Directors and Community Relations Directors have a responsibility to understand the many features available to help meet a customer's care needs or concerns. In addition to understanding the features they can offer, both need to be able to express those features in a way that shows the specific benefit to an individual customer / family.

Our features

Your community will have many individualized features to offer to a customer. You might have an emergency pendant system that a resident can wear, while your sister community may offer a pull-cord alert system. Whatever your community-specific features are, it is up to you to become fully versed in them and be able to explain them to your customers.

In addition, Emeritus nationally offers many features to help allay a customer's care concerns. Some of the key features that you need to understand and be able to discuss include:

- Comprehensive Resident Evaluation
- Join Their Journey
- Ethics First
- Emeritus Family Values & Brand Promise
- Personal Transitions Program
- Financial Partnerships with ElderLife, Life Care Funding Group, VA
- Comprehensive Process Review
- Brain Health
- Ask the Experts
- Friendship Suites
- Home Visits
- Personal Care Program

Explaining the benefit

In order to successfully explain each feature that applies for a particular customer and their family, you need to get comfortable talking in the language of personalized "Features and Benefits". This is the easiest way to explain your great solution in a way that makes sense for your customer and their specific situation.

The language of Features & Benefits is:

"What this is (state the feature)

How it works (explain how it will work for that particular customer)

And what this means to you is (explain how it will solve their specific problem)

Will that work for you?"

Here's an example that explains our Comprehensive Resident Evaluation in the language of Features & Benefits:

"This is our Comprehensive Resident Evaluation.

How it works is that our nurse will spend 45 minutes to an hour with you and your mother discussing your mom's diagnoses, her care needs, personal preferences and a little bit of her life story. When our nurse completes the evaluation, he will then process that information in our WeCare computer program to create a tailored care plan just for your mom. This plan will address the time needed to complete care activities, how often those care activities need to be done, any personal preferences that you or your mother may have, and the staff required to complete the activities.

What this means to you is that you can be assured that your mother's care is being managed in a way that you and she prefer and that all of her care needs will be met.

Will this work for you?"

CORE = Value

Using the philosophy of CORE will help you to advance sales by offering your customers what they really need and want – personal attention to their biggest concerns. This is the best way to sell the value of what you do in your community every day.

For More Information...

- Consult your RDSM for more information about the features listed above.

EVENT PLANNING

Big picture

The planning of events is an important part of your external outreach duties as a Community Relations Director. These events can cover a broad range of topics and themes and target a variety of people. Regardless of the event theme/type, the outcome must always be the same:

- to build new relationships,
- to continue building on established relationships,
- to promote the Emeritus Senior Living brand name, and
- to receive referrals of future residents to your community.

Our expectations

It is an Emeritus ***Community Relations Director Standard*** to manage TWO quarterly events:

- One event utilizing the Department Head Team that targets inquiries, the general public or referral sources, and
- another to promote Family and Friend Referrals.

Recognize that your standard may vary slightly depending upon your local market. Your Regional Director of Sales and Marketing and your Executive Director will be work with you to design the standard that is right for your community.

It is expected that the community teams (primarily your department heads) will help support you in the execution of these events so that you are able to remain focused on occupancy growth. Your effectiveness can be measured not only by attendance at your events, but more importantly by the resulting referrals to your community which will be documented appropriately in ***You've Got Leads.***

Step 1: Who is your Target Audience?

The first step in event planning is figuring out who your target audience will be. The target attendance group will depend on the type of community event you are hosting. Some events are strictly for referral sources, others are intended to strengthen your position in the larger local community, some are used as a vehicle to invite future residents, and other events target our current resident population and their friends.

Step 2: Event Ideas and Planning

Once you have decided on a target audience, schedule yourself sufficient planning time. Most events require the efforts of your whole team and appropriate notice will be needed

to send invitations and to receive any RSVP's back as well as enough time to send *Press Releases* or *Calendar Listings*. Event ideas can also be very community specific. For example, your community is a Free Standing Memory Care so you host an event promoting ***Emeritus' Brain Health Program***.

Step 3: Event Promotion

There are a variety of ways to promote any community event. Listed below are just a few examples.

- **Press Release:** Make a list of your local media (print, radio, tv) and find out how they prefer information to be sent and to who's attention you should send it to. Typically you will send out a preliminary press release anywhere from two to four weeks prior to any event. You will then follow up the day before the event with a reminder, then immediately after with pictures and any appropriate attendee quotes. Remember to have residents complete a *Model Permission & Release Form* (found on E&Me) if you use their picture or comments. Don't get discouraged if you don't see any immediate press, there are always slow press days and you may see your community's event days or even weeks later. For help writing a Press Release contact your Regional Director of Sales and Marketing.
- **Calendar Listing:** Again, find out from your local media how you go about getting your event listed in the Community Calendar. You will need to know how early you need to list your event and how they prefer to receive your community's information. Typically they will need a minimum of two to four weeks notice. This is also usually FREE PRESS so take advantage of the listings. Don't forget your local Wal-Mart – a lot of them now list community events on their closed circuit tv throughout the store.
- **Invitations:** These can be mailed, e-mailed or the best option - *hand delivered*. Make sure you follow up with a call to confirm the invitee's attendance and express your excitement over the upcoming event. Keep some invitations on hand in the community for last minute invites (especially for scheduled or walk-in tours). This is a great way of securing that next step. Always carry invites with you as you complete home visits and sales calls.
- **Chatter in your Community:** Make sure your entire team is aware of the upcoming events because their enthusiasm can be contagious! Utilize tasteful signs in picture frames around the community, especially the lobby and gathering places for family and friend events. Communicate details to the Activities Director to make sure the event gets listed in the Community Activity Calendar and contact your Business Office Director to coordinate any invitations that could go out with resident monthly billing statements.

*There are several ways to promote events at no cost to your community. Check into local radio stations and Senior Centers for information. The more successful your external outreach is the more successfully your event will be promoted.

Step 4: The Event and Tracking the Details

Don't forget to track all of the details regarding your event. These are the logistical details that you will need to plan for in advance and then review once the event is completed. Plan for:

- Costs – work with your Executive Director to establish a realistic budget and then stick to it!
- menu choices – don't forget to plan for special diets – try to pick a menu that has something for everyone (vegetarians, diabetics, non-drinkers, etc.)
- logistical aspects of the event like where it was held, set-up schematic, chairs/tables rented, etc.
- which day of the week and the time and length of event – watch out for uncommon holidays, etc.
- how you promoted it (copy of any calendar listing or press releases) – keep copies of all promotional activities
- team participation and what they were responsible for
- contact information for any guest speakers or entertainers (any associated costs)
- PICTURES of the event
- Associates on hand to help clean up – YOU HELP TOO!

You'll also need a means of capturing attendee's names and contact information, whether that's a Sign-In Book or even coordinating a gift basket to be raffled off. If you decide to go the gift basket route, remember to have slips for the attendees to fill out with the desired information you'll need such as name, address, phone number and best time to call since the winner may not need to be present.

* Be ready on the day of the event to provide tours of your community! Have several Back Up Team members on-hand and ready to help with tours. And always have your planner ready to schedule those *time activated next steps*.

Step 5: Follow Up After the Event

Events can be hectic and exhausting, but well worth the effort. Make sure you schedule time in advance with the team to debrief at the end of the event. Take note of what went really well and what you and your team might do differently next time. Since you've been tracking your event you'll have a basic blueprint for repeating it if it was successful! Coordinate the follow up with your team and decide how you want to thank visitors to your community. If there was a raffle basket or prize drawing, deliver it in person with an invitation to come back for lunch.

For more information...

For additional support, regional and community-specific standards, contact your

Regional Director of Sales & Marketing.

For more information and resource ideas, check out these links:

- Community Relations Director Standards
- "How To" A Media & Public Relations Guide
- Model Permission & Release Form

Consult your RDSM for additional tools and training.

EVENT PLANNING

Big picture

The planning of events is an important part of your external outreach duties as a Community Relations Director. These events can cover a broad range of topics and themes and target a variety of people. Regardless of the event theme/type, the outcome must always be the same:

- to build new relationships,
- to continue building on established relationships,
- to promote the Emeritus Senior Living brand name, and
- to receive referrals of future residents to your community.

Our expectations

It is an Emeritus ***Community Relations Director Standard*** (Shannon – link?) to manage TWO quarterly events:

- One event utilizing the Department Head Team that targets inquiries, the general public or referral sources, and
- another to promote Family and Friend Referrals.

Recognize that your standard may vary slightly depending upon your local market. Your Regional Director of Sales and Marketing and your Executive Director will be work with you to design the standard that is right for your community.

It is expected that the community teams (primarily your department heads) will help support you in the execution of these events so that you are able to remain focused on occupancy growth. Your effectiveness can be measured not only by attendance at your events, but more importantly by the resulting referrals to your community which will be documented appropriately in ***You've Got Leads***.

Step 1: Who is your Target Audience?

The first step in event planning is figuring out who your target audience will be. The target attendance group will depend on the type of community event you are hosting. Some events are strictly for referral sources, others are intended to strengthen your position in the larger local community, some are used as a vehicle to invite future residents, and other events target our current resident population and their friends.

Step 2: Event Ideas and Planning

Once you have decided on a target audience, schedule yourself sufficient planning time. Most events require the efforts of your whole team and appropriate notice will be needed

to send invitations and to receive any RSVP's back as well as enough time to send *Press Releases* or *Calendar Listings.* A great tool to utilize for event ideas is the *Great People Great Relationship Calendar* (Shannon – link?). This can be found on E&Me and is listed monthly. The calendar is arranged so that there are specific themes for each month and then a variety of meaningful (and sometimes wacky) ways to celebrate every day. Event ideas can also be very community specific. For example, your community is a Free Standing Memory Care so you host an event promoting ***Emeritus' Brain Health Program.***

Step 3: Event Promotion

There are a variety of ways to promote any community event. Listed below are just a few examples.

- **Press Release:** Make a list of your local media (print, radio, tv) and find out how they prefer information to be sent and to who's attention you should send it to. Typically you will send out a preliminary press release anywhere from two to four weeks prior to any event. You will then follow up the day before the event with a reminder, then immediately after with pictures and any appropriate attendee quotes. Remember to have residents complete a *Model Permission & Release Form* (Shannon – link?) (found on E&Me) if you use their picture or comments. Don't get discouraged if you don't see any immediate press, there are always slow press days and you may see your community's event days or even weeks later. For help writing a Press Release contact your Regional Director of Sales and Marketing.
- **Calendar Listing:** Again, find out from your local media how you go about getting your event listed in the Community Calendar. You will need to know how early you need to list your event and how they prefer to receive your community's information. Typically they will need a minimum of two to four weeks notice. This is also usually FREE PRESS so take advantage of the listings. Don't forget your local Wal-Mart – a lot of them now list community events on their closed circuit tv throughout the store.
- **Invitations:** These can be mailed, e-mailed or the best option - *hand delivered.* Make sure you follow up with a call to confirm the invitee's attendance and express your excitement over the upcoming event. Keep some invitations on hand in the community for last minute invites (especially for scheduled or walk-in tours). This is a great way of securing that next step. Always carry invites with you as you complete home visits and sales calls.
- **Chatter in your Community:** Make sure your entire team is aware of the upcoming events because their enthusiasm can be contagious! Utilize tasteful signs in picture frames around the community, especially the lobby and gathering places for family and friend events. Communicate details to the Activities Director to make sure the event gets listed in the Community Activity Calendar and contact your Business Office Director to coordinate any invitations that could go out with resident monthly billing statements.

*There are several ways to promote events at no cost to your community. Check into local radio stations and Senior Centers for information. The more successful your external outreach is the more successfully your event will be promoted.

Step 4: The Event and Tracking the Details

Don't forget to track all of the details regarding your event. These are the logistical details that you will need to plan for in advance and then review once the event is completed. Plan for:

- Costs – work with your Executive Director to establish a realistic budget and then stick to it!
- menu choices – don't forget to plan for special diets – try to pick a menu that has something for everyone (vegetarians, diabetics, non-drinkers, etc.)
- logistical aspects of the event like where it was held, set-up schematic, chairs/tables rented, etc.
- which day of the week and the time and length of event – watch out for uncommon holidays, etc.
- how you promoted it (copy of any calendar listing or press releases) – keep copies of all promotional activities
- team participation and what they were responsible for
- contact information for any guest speakers or entertainers (any associated costs)
- PICTURES of the event
- Associates on hand to help clean up – YOU HELP TOO!

You'll also need a means of capturing attendee's names and contact information, whether that's a Sign-In Book or even coordinating a gift basket to be raffled off. If you decide to go the gift basket route, remember to have slips for the attendees to fill out with the desired information you'll need such as name, address, phone number and best time to call since the winner may not need to be present.

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For more information and resource ideas, check out these links:

- Community Relations Director Standards
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- Great People Great Relationships Calendars *(type GPGR into E&Me Search box and click "Go!")*

Consult your RDSM for additional tools and training.

For More Information...

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Consult your RDSM for additional tools and training.

HANDLING INQUIRY CALLS

Big picture

Emeritus regards every call that comes in to our communities asking for more information about our services as a call for help, or a "911" call. We respond immediately and use tools that help us to be the best empathetic listeners that we can be. Our goal is to help every caller find their best solution.

Our expectations

We expect that every call that comes in is answered within three rings. The person answering the phone responds pleasantly and professionally. If it is not the CRD answering the call, the call is transferred immediately to the CRD. If the CRD is not available, the call is then transferred to the Executive Director. If the ED is not available, the call goes to the next person on the Sales A Team.

Our Process

The first thing that we do as we prepare to help the caller is to ***ask permission to ask a few questions.*** We immediately establish if the caller is a friend or family member of the future resident, or if it is the actual future resident themselves making the call. Once we determine this, we will know which ***Connections*** form to use.

Emeritus ***Connections*** forms have been developed to provide you with the right questions to ask your caller, in the right order. They have been field-tested and have been proven highly successful in creating large occupancy gains in communities that use them correctly. The Emeritus standard is that a ***Connections*** form is used for EVERY inquiry call.

The *Connections* forms that we have available for initial inquiries are:

- Friend or Family Caller
- Prospective Resident
- Memory Care

Once you have the correct form, you will start working your way through it. It's important to understand that during this call, you want to spend 75-90% of your time in active listening mode – not talking! This is about their problem and their concerns. We can't start trying to help them solve it until we know all the details. Remember that with each question on the Connections form, you will want to ask for more information. For example:

"May I ask what prompted you to come in?" Caller answers.
"Tell me a little more about that." Caller answers.
"What else?" Caller answers.
"How is this affecting you?" Caller answers.

Then, you move on to the next question.

Empathetic listening means that we are true listeners. We aren't just thinking of all kinds of solutions while the caller is talking – *we are truly trying to understand their situation and how it is affecting them.* Not how we are going to benefit from that move-in. When you embrace a mindset of empathetic listening, your success in sales multiplies rapidly.

At certain times during the call, it becomes obvious that you will be able to present a personalized solution to their unique problem and concern. It is not about "laundry-listing" all of the services that we have to offer.

The call will end with you securing a next step. The expectation is that we invite them to visit our community and immediately offer a choice of two times.

Once your next step is secured, move on to page 2 of the ***Connections*** form and get all of their contact information, including how they heard about us.

For More Information...

- Check out the Quick Guide - Inquiry Calls, located in the E&Me library.
- Consult your RDSM for additional practice and training on the ***Connections*** forms.

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OFF SITE VISITS

Big picture

Emeritus sets itself apart from other assisted living providers with our intense focus on off site visits. What we have discovered is that by engaging in this activity, we are able to connect on a very real and very personal level with our prospective residents and their families. Our willingness to "go to them" several times during the sales process is what sets us apart from the competition.

Our reason for going

We go on off site visits for several reasons:

- To create a memorable, personal customer service experience
- To serve one of our top referral sources
- To secure a next step
- To identify needs and wants
- **To see if our customer is safe – you have to go to know!**

What is considered an off site visit?

Off Site Visits can happen in many different locations, including:

- Potential resident's home
- Potential resident's SNF or rehab
- Potential resident's hospital
- Family member's home
- Neutral site with family or potential resident (ex. Starbucks, Dennys, etc.)
- Graduated respite resident's home
- Cold or Warm lead's home
- Visiting any potential resident on behalf of a sister community in another city or state

The Emeritus standard for visiting someone at their private residence is that TWO associates conduct the visit. Two is better than one!

The number of home visits that your community completes each month will be determined by the RDSM, the ED, and the CRD. The communities with the most successful occupancy levels are doing many, many home visits each month.

So, who does these off site visits? The fact is, anyone on your staff who can make

impact can be invited to help with off site visits. For example, if you have a cook in your dining services department who is a veteran and is a very personable fellow, you might invite him to go along and meet a potential resident who was also a veteran. They will almost definitely engage in some great discussions together. Plus, you are building your sales culture in your community by inviting other staff into the sales process!

For more information...

- Check out the Quick Guide - Off Site Visits, located in the E&Me library.
- Consult your RDSM for additional practice on conducting Off Site Visits.

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HOME VISIT SAFETY / SECURITY

Policy

The Company has a policy of zero tolerance for workplace violence, verbal and non-verbal threats and related actions. This policy addresses how to reduce or eliminate the risk of employee exposure to violence when conducting home visits.

Warning Signs of Potential Violent Situations

The following situations are warning signs of potential violent situations and employees should immediately leave the home visit premises without conflict and without directly addressing any involved person(s) if any of the following situations occur:

- Escalating behaviors such as yelling, screaming or any movements meant to physically threaten employees or a potential resident in any way,
- The presence of others / possible conflict with other family members that involve any threat or other violent behavior,
- If employee or co-worker feels threatened in any way

IMPORTANT:

If the employee or potential resident seems to be in immediate danger, the employee should call 911.

The employee should call the community contact person immediately once a safe distance has been obtained.

Procedures:

Home Visit Safety

The table below explains the procedures community personnel must follow to reduce the possible threat of violence when conducting home visits.

Who	What
ED / CRD	• Designate a contact person for home visit employees to tell when the visit will occur and to check in with when the visit is completed. (Contact person will follow up if an employee does not report in as expected). • Review the home visit employee's driving record in the state in which they are licensed to operate a motor vehicle prior to providing them permission to do home visits. (Check Vehicle Safety Manual - Section VSM 1 for information on how to search for employees driving record) • Provide information on multicultural diversity to increase staff sensitivity to racial and ethnic issues and differences
All Home Visit employees	• Use the "buddy system." Never conduct home visits alone. • Inform the designated contact person when the visit will occur and when it has ended.

	• Carry a cell phone at all times during the visit – never use cell phone while driving • Schedule visits during day light hours, • Do not provide personal information to potential residents you visit (personal phone numbers, home addresses, etc..), • Lock your car at all times/ Never leave your keys in your vehicle • Close all windows completely • Never leave important documents/valuables in view • Park in a safe area and in manner that provides for quick escape • Know the location of the local police and fire departments • Become familiar with the neighborhood. Never enter an unsafe neighborhood or situation • Carry vehicle keys in your hand for accessibility as well as a means of protecting yourself • When leaving a location, check inside and under your vehicle before entering • Use discretion to avoid injury if asked to lift objects or move items by the potential resident/family member during visit

Home Visit Incident Reporting

It's important to keep a record of all incidents associated with home visits. The table below explains the steps employees and management staff should take if an incident occurs during a home visit.

Who	What
Management staff	• Ensure that no employee who reports or experiences workplace violence faces reprisals of any type. • Encourage employees to promptly report incidents and suggest ways to reduce or eliminate risks. • Require records of incidents to assess risk and measure progress. • Encourage the employee to obtain appropriate medical care, counseling, workers' compensation or after a violent episode or injury
Employees who experience an incident during a home visit	• Report incident promptly • Follow the company's protocol if the they are injured during the incident

Employee Vehicle Maintenance

The community should follow the Motor Vehicle Records (MVR) checks procedures as listed in the Vehicle Safety Manual - Section VSM 1 - to search for the employee's driving record in the state(s) in which the employee is licensed to operate a motor vehicle.

Employees using their own vehicle to conduct home visits should maintain them in proper operating condition as detailed in the table below.

Who	What
Home visit employees who use their personal car.	• Check lights, indicators, and plates to ensure they are clear and in proper working condition, • Check gauges to ensure proper working condition • Adjust mirrors, seats, headrests, and seatbelt before driving. • Do not ignore maintenance warning lights • Check for fluid leaks • Have your belts and hoses checked according to your owner's manual • Have routine vehicle maintenance checks/oil changes, • Do not operate your vehicle if a maintenance issue is present • If a maintenance issues occur, pull over, turn on emergency flashers, and call for help

Related Links

Vehicle Safety Manual - VSM 1 Employee Handbook STEPS Safety Manual - Appendix F

INTERNET INQUIRIES

Big picture

In 2007, Emeritus averaged 23,299 unique users per month to the Emeritus website. Each community averaged 87 consumers reading their on-line brochures each month. This generated, on average, at least 1 email request for more information, 12 consumers printing out the brochure, and 5 telephone calls to the community *EVERY MONTH for EVERY COMMUNITY.*

Furthermore, when we consider who our internet customers are, we must recognize that when they actually take the step of requesting more information from us via the internet, they are very serious consumers. Remember, our internet customers are generally adult children who work, have limited time, and are very internet-savvy. Their request for more information is a "911" call for help.

Our standards

Our standards for internet inquiries are very similar to those for phone inquiries:

- Respond within 24 hours – even better if you can respond immediately and catch them while they are still online
- Ask permission to ask questions
- Use the "Formula for Success" in our responses
- Avoid judgment – treat them as if they are "hot" leads
- Prepare the customer for continued follow up
- Open and use a ***Connections*** form for the lead

Formula for success

The Emeritus Formula for Success with internet leads is a 4-step process:

1. We respond ***QUICKLY***. Our customer is used to "real time" so our response needs to be as fast as possible. Plus, we want to engage them before our competitors do.
2. We customize each response by ***PERSONALIZING*** it. Use your name, introduce yourself, explain your position, even include a picture of yourself.
3. We ***ENGAGE*** the customer by asking permission to ask questions first. Let them know that how you will be following up with them and make clear your commitment to help them find the right solution, regardless of what or where it might be. Give them phone numbers to reach you and the best times to call you back.
4. We are ***CORRECT*** in our responses. Use correct grammar and proper spelling! Give them the information that they are asking for – not just a "laundry list" of everything that we do. Connect with them.

For more information...

- Check out the Quick Guide - Internet Inquiries, located in the E&Me library.
- Consult your RDSM for additional practice and training on the ***Connections*** forms.

KNOWING YOUR COMPETITORS

Big Picture

As a Community Relations Director (CRD) it's not only vital for you to understand what makes Emeritus unique in the healthcare community at large, but how our competitors separate themselves as well.

We want to constantly be aware of what is happening in our market and what our competitors are doing with their pricing and programs.

Begin by asking yourself these questions:

- "What do we offer?"
- "What do other Assisted Living communities offer?"
- "How can we best serve a potential resident and their family members?"

Our Expectations and Process

Each CRD is expected to update and complete a Competitive Analysis Form for their market on a quarterly basis.

As advocates of the **Safely Somewhere philosophy**, we are committed to acting as a resource to future residents, their family members, professional referral sources and our own current residents. Toward this end, a well educated and prepared individual will make the best resource so you'll be begin by first understanding how your own community enhances Senior's lives.

Questions to ask yourself:

- "What service packages/levels of care are offered?"
- "What are the basic amenities found in your community?"
- "What is your pricing structure to include move in fees/community fees?"
- "Do you have any unique programming?"
- "What are the physical aspects of your community, including apartment sizes and availability?"

Useful Tools

The Community Fact Sheet found on E&Me in the Sales and Marketing library is a great tool to use when you are learning about what your community has to offer. Print it out and start filling it out.

HINT: This is also a great tool for your Back Up Teams to keep in their binders.

Understanding Our Competitors

In order to best understand the services our competitors provide, begin by scheduling sales calls with their Admissions/Marketing Directors, Resident Care Directors or Executive Directors. Fill out page 1 of the Professional Relationship Profile prior to going into the appointment.

When you meet with these individuals keep in mind our Safely Somewhere Commitment - we are committed to finding a safe solution for seniors even if that means we refer to another assisted living community.

Remember to ask yourself "what services do they offer that perhaps we don't or how will their community be better able to assist that senior?"

As you continue to strengthen your relationship with our competitors and gain their current pricing strategies you'll be sharing how your Emeritus programming will be the ideal solution if and when they need to refer out.

For More Information...

- Contact your RDSM or VPSM for additional assistance
- Check out these links to:
  - Competitive Analysis Form
  - Relationship Profile/Professional Page 1 – Journal
  - Relationship Profile/Professional – Page 2-3

KNOWING YOUR COMPETITORS

Big Picture

As a Community Relations Director (CRD) it's not only vital for you to understand what makes Emeritus unique in the healthcare community at large, but how our competitors separate themselves as well.

We want to constantly be aware of what is happening in our market and what our competitors are doing with their pricing and programs.

Begin by asking yourself these questions:

- "What do we offer?"
- "What do other Assisted Living communities offer?"
- "How can we best serve a potential resident and their family members?"

Our Expectations and Process

Each CRD is expected to update and complete a Competitive Analysis Form for their market on a quarterly basis.

As advocates of the **Safely Somewhere philosophy**, we are committed to acting as a resource to future residents, their family members, professional referral sources and our own current residents. Toward this end, a well educated and prepared individual will make the best resource so you'll be begin by first understanding how your own community enhances Senior's lives.

Questions to ask yourself:

- "What service packages/levels of care are offered?"
- "What are the basic amenities found in your community?"
- "What is your pricing structure to include move in fees/community fees?"
- "Do you have any unique programming?"
- "What are the physical aspects of your community, including apartment sizes and availability?"

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KNOWING OUR CUSTOMERS

Big Picture

At Emeritus, we have several different types of customers who are shopping for assisted living. Overall, they fall into two separate categories:

1. Adult children and/or friends of the future resident
2. The future resident

Both groups are important and we must understand what motivates them and how to communicate with them.

Adult Children

Adult children are busy. They have a sense of urgency and pressures on their time that we easily recognize. They are all about moving things forward. As adults ourselves, we understand that kind of momentum, we can empathize with it, and we know how to communicate in a way that matches the adult child's needs.

The problem that we run into is when the urgency and momentum that the adult child is experiencing (and that we understand) collides with the future resident's need to take more time and have some control in the decision that is being made. We can help solve this problem by gaining a better understanding of that future resident and facilitating the communication process between them and the adult child.

When you hit a wall – the adult child is ready to make the move happen, but the future resident is not ready – you need to step back and work more closely with the future resident. Give them more control of their situation. When this moment arrives, we may have to say to the adult child, "We've worked through this same struggle with other families. Trust me to help you with this process. In order to do that, I need to spend a little more time with your mom, dad, aunt, etc."

Future Resident

Future residents are very different. They are in the part of their lives where their whole journey is not about forward motion anymore. It's about reflection and review of a life already lived. They are processing 70, 80, 90 years of memories and trying to put together a picture of what it all meant. They are in the process of building their ***legacy***. As a result of this review and reflection, they are processing information differently and their sense of urgency is not something that we easily understand. We often see repeated trains of thought and non-linear communication styles. What sounds to us like wandering from topic to topic is actually a clue that they are in the process of reviewing.

The other thing that our potential residents are dealing with is the need to retain ***control*** of their life and their surroundings. This is the one thing that is slowly slipping away from them and once it's gone, they are left facing their impending death. If we can help them retain some of that control in their choices regarding our services and solutions, we create a win-win situation.

- Watch for themes in the things that they are repeating and then figure out how we can fit our services to their needs. Remember, they are sorting through 80+ years of memories! Don't become frustrated --- look for the things that matter most to them.
- Use stories and metaphors when you explain things to them initially. As we age, our right brain takes on the more dominant role of gatekeeper and we respond better to stories and metaphors as we start to build a relationship.
- The "obvious choice" may not be right for them. They need to retain control of their choices – even if it means sacrificing the logical choice. We need to present our solutions/services in a way that they can see they are still in control.
- Use language that matches their needs.
  "This is your decision. We will work with whatever you feel is the right choice." This is a CONTROL question.
  "What do you remember about your grandparents?" This is a LEGACY question.

Building this relationship may take some time. Statistics show that it takes about 3-5 home visits with a potential resident before they are ready to move in to an assisted living community. But if you take that statistic and compare it with all of the folks who are sitting in You've Got Leads and considered "cold" because we got the call that "Mom isn't ready to move", you will find that you have lots of leads who are only 3 to 5 home visits away from moving in! Don't give up on those folks! They need to be Safely Somewhere. We just have to approach our relationship with them a little bit differently before we see the results we are hoping to see.

For More Information...

- Consult your RDSM for additional strategies on communicating with your leads.
- Check out the book How to Say it to Seniors by David Solie. It's an excellent resource for anyone who works with seniors.

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MANAGING YOUR LEADS

Big Picture

The Community Relations Director is ultimately responsible for the upkeep of the lead base and for managing leads appropriately. Executive Directors also enter leads when they take an inquiry or complete a tour / home visit / professional sales call. Our leadbank is a web-based database that is called "You've Got Leads" (YGL).

Our Expectations and Best Practices

The expectation and standard for a CRD is that you are managing your leads (both inquiries and professional referral sources) on a daily basis. This means that you must utilize YGL every day. It is expected that leads are entered into the database immediately after every inquiry call, scheduled or walk-in tour experience or sales appointment. Additionally, notes from follow-up calls or next steps must be entered into YGL immediately.

EDs are also expected to monitor weekly the usage of YGL by the community CRD and to manage the sales function by making sure that the CRD is complying with daily usage of the system.

It's not only important to enter information into your lead management system in a timely manner but it's critical to classify those leads into one of several categories: White Board (leads on your Safely Somewhere Board), Hot (leads that will close within 30 days), Warm and Cold. Please keep in mind you'll also want to be accurate with assigning those inquiries to an appropriate Referral Source.

The standard for follow-up calls for every CRD is 50 calls per week. This standard may be revised/adjusted by your Regional Director of Sales and Marketing (RDSM) and Executive Director (ED) to create a more "Customized" Follow Up standard based upon the number of leads in your leadbank. Your RDSM and ED will designate an appropriate and manageable number of leads for your weekly follow up tasks.

Unfortunately, it's not always feasible to run back to the community after every sales call and enter your data. In those instances when you cannot immediately enter your information, you will need to have a back-up plan in place for how you are going to get the information into YGL.

One best practice that successful CRD's use is having a trained concierge enter their data for them. The downside of this is that if you were the one to take the call/tour/appointment, you really are the best one to write comprehensive notes in the database.

One of the most popular best practices is to time activate time in your calendar each day where you do nothing but get your notes into YGL. If this is the option that you choose, remember that when you enter the "Notes" section, YGL will automatically time-stamp the note for the time that you are entering it – not for the time and date that you actually completed the task. For this reason, we require that you add into the notes section the actual time and date that you completed the task.

Another requirement for managing your leads is that every lead has a follow-up task assigned to it. YGL is unique in that it won't actually let you navigate away from that

particular lead or referral source until you get that next step assigned and entered.

Closing out leads is another area that we take very seriously. Remember, our commitment is to help every lead get "Safely Somewhere". Just because we haven't been able to reach them for the last five times we called doesn't mean that they are safe. Before you close out any leads, Emeritus asks that you elevate the reason for closing the lead to your Executive Director and your RDSM. Consider it to be just like a move out. All move outs are elevated to the Executive Director and the Regional Director of Quality Services.

All hard copies of your Connection Forms are to be kept in a binder or file, either in alphabetical order or by month of initial inquiry.

For More Information...

- Consult your RDSM for additional training on managing your leads.
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NETWORKING

Big Picture

Networking is an important component of any Community Relations Director's successful external sales program. It provides a common platform from which relationships are begun, valuable pre-planned sales calls can be scheduled and allows you to strengthen relationships with existing professional referral sources to gain referrals for your community. With the help of your Executive Director and Regional Director of Sales and Marketing, and depending upon the needs of your community, you will develop a specific strategy with regards to how much time and to what extent your involvement in certain groups will be. This strategy will be designed to achieve the outcome that will be the most advantageous to your community's occupancy growth.

Our Expectations

While networking is a valuable sales and marketing tool, please keep in mind that as with any event you may attend or even host, the end result is to make meaningful use of your time, resulting in relationship building and ultimately referrals to your community. In order to facilitate this expectation, be prepared with your objectives prior to the networking event. Bring a calendar to schedule time-activated next steps and ensure that your Professional Relationship Profiles and You've Got Leads are updated in a timely manner with any new information you may have gathered.

Best Practices

Here are a few suggestions with regards to successful networking:

1. Volunteer **to Host the next Networking Meeting:** Many groups meet once a month or once a quarter and are often looking for available locations to hold those meetings or events. Volunteer your Emeritus community and make the meeting a memorable one. Surprise and delight attendees with a small, well-planned royal treatment gift, a themed raffle basket and always provide fabulous food that will showcase our Dining Services Team. Please partner with your Executive Director and Regional Director of Sales and Marketing to come up with creative ideas that allow you to stay within your budget.

    - **Kick-Off the Meeting:** Make arrangements with the appropriate people in advance so that you can make the most of your limited speaking time. As the host of the meeting, you will generally be given permission to "show and tell" about your community. You'll want to have something brief prepared that allows you to share "highlights" with regards to your community. Most Assisted Living communities offer similar amenities...what sets your community apart from the rest? If you only have 5 minutes to speak, what are the most important things to share with the group? Be creative with this part! Most of these folks have sat through the same presentation time and time again. Do something fun and different – maybe a skit or ask someone in the group to role

play what you have to offer at your community. You might even come up with a game show to play with the group – breaking them into two teams and having them provide answers to questions about your community and what services you offer.

- **Be Prepared to Provide Tours Experiences to Meeting Attendees:** You'll want your experienced Department Team Members working with you on this one. Be prepared in advance with group sizes, what everyone will be sharing and which direction you'll be heading in so it flows seamlessly on the day of the networking event. Don't forget any community collateral in case someone doesn't have time for a personalized experience.

2. **Offer to Sit on the Networking Committee Board:** Make sure you are inquiring into the particulars of how each Networking Committee functions. Are there Board Positions or Officer Spots available? When do they hold elections? You'll want to make sure that once you do commit to a networking group that you have stellar meeting attendance and actively participate.

3. **Create Your Own Networking Group:** This is a great idea if your market is missing a networking group for Healthcare Marketing and Administrative Professionals. What better way to pull together your competitors in the Healthcare Community than to be a founding member. Make sure everyone is included and have a specific agenda agreed upon by several parties to include time for a guest speaker at each meeting.

4. **Offer to be the Guest Speaker for an Upcoming Meeting:** All networking groups have pre-planned agendas for each meeting that include a guest speaker who is an expert on a certain topic. Share your expertise by offering to be the guest speaker or to help find a great guest speaker.

Possible Networking Organizations to Join

Here are a few suggestions with regards to some organizations or networking groups that **may meet** in your market. Please partner with your Executive Director and Regional Director of Sales and Marketing to decide where to target your networking efforts in order to make the most impact with occupancy in your community.

- Chamber of Commerce
- Alzheimer Association
- MAPS (Marketing and Administrative Professionals Society)
- Advocacy groups
- Diabetes Association
- Local Government groups
- Stroke Association
- Multiple Sclerosis Society
- Muscular Dystrophy Society

- Cancer Society
- Better Business Bureau
- Senior Housing Association
- Business and Professional Women's groups
- Local Realtor's groups

For More Information...

- Contact your Regional Director of Sales and Marketing, Vice President of Sales and Marketing or Executive Director for additional tools and training
- Relationship Profile/Professional Page 1 – Journal
- Relationship Profile/Professional – Page 2-3

PROFESSIONAL RELATIONSHIP JOURNAL & THE APPOINTMENT

Big Picture

Once you have set your appointment with the professional referral source you are almost ready for your appointment. Now you need to work with the Professional Relationship Journal (PRP) and review pages 2 and 3 of the Professional Relationship Profile.

Our Expectations

The expectation is that you will use the Professional Relationship Profile with ALL referral sources. Your Regional Director of Sales & Marketing will review your profiles on his/her site visit. This document has been tested and widely proven to greatly increase results for Executive Directors and Community Relations Directors who use it consistently and completely.

Our Procedures: Working With the Journal Page

The first part of the Professional Relationship Profile that you will want to work with is the ***Professional Relationship Journal***, which is page 1. The Journal is your pre-planning tool that you will need to fill out prior to your appointment and is arguably the most important part of your Professional Relationship Profile. On the Journal page, the goal is to set the objectives for the call – what you hope to accomplish. You can be as broad and far-reaching as you want. Understand that just because you may have 10 objectives listed for the call, you may only accomplish one or two on this initial appointment. That's ok! Building any kind of relationship, whether it's personal or business, is a gradual process and a referral source relationship is the same. It may take you five appointments before that source feels right about making more referrals. You will keep the Journal page and refer back to it before each subsequent appointment. You may end up changing some of the objectives after the initial appointment. This is designed to be a living document which means it's going to change based on what you learn and the direction that your relationship takes.

So, start by brainstorming your objectives and filling those in on the Journal. Make sure that you do your research and add in the information on the top right corner of the Journal page regarding things like "Owner/affiliation, Beds/Caseload Mix, etc." If you don't find all the answers to those questions prior to your appointment, then finding the answers during the sales appointment should be one of your objectives.

Most importantly, you need to remember that you will want to exit the appointment with at least one next step in place and time activated. For this reason, a best practice is to *pencil* in some ideas for next steps/follow up on your Journal page. You may end up with completely different next steps, but at least it is there as a reminder that you will need to walk out of there with something scheduled. If you aren't sure what a next step might look like, remember our PINITO acronym:

P – Person/referral – do they have a referral for us?

I – In-service – would the referral source and their staff benefit from an in-service conducted by us? Could they conduct an in-service for our staff?

N – New leads – do they have any new leads they can share with us?

I – Introduction to new leads – would they be willing to call and introduce us to the new lead?

T – Tour of our community – schedule a tour of our community for the referral source and their staff.

O – Connect this person to "other" (someone else) in our community or organization

Once you have the Journal prepared, you are ready to conduct the sales call using the next 2 pages of the Professional Relationship Profile. But your work with the Journal page is not over just yet! Remember, this is a living document that is going to grow and change – particularly after the sales call is completed. Once you complete the appointment, you need to find a quiet spot and go right back to the Journal to record your discussion notes, what the referral source needs, what your next steps are. When you get back to your community, you will enter this data in You've Got Leads.

Our Procedures: The Appointment

Pages 2 and 3 of the Professional Relationship Profile are your guides to a successful appointment once you are sitting face to face with the professional. Page 2 focuses on the "professional" goals and interests of your referral source while page 3 focuses more on their personal goals and interests. Both are important.

As humans, our natural instinct is to ask "What's in it for me?", but what we really need to know is "what's important to them? What can I do for you?" Pages 2 and 3 will help you figure that out.

When you go into the appointment, you want to remind the referral source why you are there. It can be as simple as:

> "If you recall, when we scheduled this appointment our goal was to ____________________. Do you mind if we sit down first so that I can ask you a few questions and take notes?"

Your next step is to sit and take notes. Ask those important questions from pages 2 and 3 of the Professional Relationship Profile. By working through all of the questions on the profile, you will discover:

- What is important to them?
- What has the history of our relationship with them been --- from their point of view?
- What are their challenges?
- How do they balance their personal and professional life? Who are important people to them? What do they like to do?

Just like you would with a call that comes into the community requesting more information, you are going to ask those really important questions from the form and then *spend time listening* and taking notes. Ask more probing questions to help you get the whole story --- "tell me more", "what else should I know?", "anything else?". Our process of doing professional relationship calls is very different from our competitors because we make the call all about learning about the professional we are calling on and NOT about

what we can do for them. You *will* get that opportunity to present your excellent services, but it's not the main thrust of the initial call.

When you have figured out what their concerns are and what they need, you can start presenting solutions by demonstrating how we are capable of helping. Remember that if this is a NEW relationship, it may take several appointments to establish trust and demonstrate our capability before they are comfortable making a referral to you. For folks that you have a relationship with, they will have a different comfort level with you and will be willing to send business your way. The important thing to remember on this initial call is to *find out what do they need or want*. Remember that it is all about them, not us listing out our services. The opportunity to explain how we can partner will present itself to you at the right time. Be ready for it. Just remember that the call is about them sharing what they do and us spending time listening and discovering.

When the appointment is over, thank them for spending the time with you and then time activate a next step. It could be a follow-up appointment to meet other key players on their staff, lunch with them, providing an in-service to their staff or them providing one to yours, etc. Whatever it is, offer a choice of two times and then write it in your calendar and have them do the same while you are still together.

Next, follow up with a great Royal Treatment gift. You will have learned a lot about them from page 3 of the Professional Relationship Profile. Take that information and come up with a fun and creative Royal Treatment gift that they won't soon forget! Try to follow-up within 24 hours – even better is to drop off the gift the same day as the appointment.

Once you are back in your car, go someplace quiet and complete your paperwork – before returning to the community. This will involve making sure that your notes all make sense and that you are filling in more information on page 1, the Professional Relationship Journal. These notes will include your discussion notes, what they need, the next-steps that you time activated. Once you go back to the community, enter all of the information in You've Got Leads.

For Additional Information:

- Please contact your Regional Director of Sales and Marketing
- Check out these links on E&Me:
- Relationship Profile/Professional – Page 2-3
- Relationship Profile/Professional Page 1 – Journal

PROFESSIONAL RELATIONSHIP JOURNAL & THE APPOINTMENT

Big Picture

Once you have set your appointment with the professional referral source you are almost ready for your appointment. Now you need to work with the Professional Relationship Journal (PRP) and review pages 2 and 3 of the Professional Relationship Profile.

Our Expectations

The expectation is that you will use the Professional Relationship Profile with ALL referral sources. Your Regional Director of Sales & Marketing will review your profiles on his/her site visit. This document has been tested and widely proven to greatly increase results for Executive Directors and Community Relations Directors who use it consistently and completely.

Our Procedures: Working With the Journal Page

The first part of the Professional Relationship Profile that you will want to work with is the ***Professional Relationship Journal***, which is page 1. The Journal is your pre-planning tool that you will need to fill out prior to your appointment and is arguably the most important part of your Professional Relationship Profile. On the Journal page, the goal is to set the objectives for the call – what you hope to accomplish. You can be as broad and far-reaching as you want. Understand that just because you may have 10 objectives listed for the call, you may only accomplish one or two on this initial appointment. That's ok! Building any kind of relationship, whether it's personal or business, is a gradual process and a referral source relationship is the same. It may take you five appointments before that source feels right about making more referrals. You will keep the Journal page and refer back to it before each subsequent appointment. You may end up changing some of the objectives after the initial appointment. This is designed to be a living document which means it's going to change based on what you learn and the direction that your relationship takes.

So, start by brainstorming your objectives and filling those in on the Journal. Make sure that you do your research and add in the information on the top right corner of the Journal page regarding things like "Owner/affiliation, Beds/Caseload Mix, etc." If you don't find all the answers to those questions prior to your appointment, then finding the answers during the sales appointment should be one of your objectives.

Most importantly, you need to remember that you will want to exit the appointment with at least one next step in place and time activated. For this reason, a best practice is to *pencil* in some ideas for next steps/follow up on your Journal page. You may end up with completely different next steps, but at least it is there as a reminder that you will need to walk out of there with something scheduled. If you aren't sure what a next step might look like, remember our PINITO acronym:

P – Person/referral – do they have a referral for us?

I – In-service – would the referral source and their staff benefit from an in-service conducted by us? Could they conduct an in-service for our staff?

N – New leads – do they have any new leads they can share with us?

I – Introduction to new leads – would they be willing to call and introduce us to the new lead?

T – Tour of our community – schedule a tour of our community for the referral source and their staff.

O – Connect this person to "other" (someone else) in our community or organization

Once you have the Journal prepared, you are ready to conduct the sales call using the next 2 pages of the Professional Relationship Profile. But your work with the Journal page is not over just yet! Remember, this is a living document that is going to grow and change – particularly after the sales call is completed. Once you complete the appointment, you need to find a quiet spot and go right back to the Journal to record your discussion notes, what the referral source needs, what your next steps are. When you get back to your community, you will enter this data in You've Got Leads.

Our Procedures: The Appointment

Pages 2 and 3 of the Professional Relationship Profile are your guides to a successful appointment once you are sitting face to face with the professional. Page 2 focuses on the "professional" goals and interests of your referral source while page 3 focuses more on their personal goals and interests. Both are important.

As humans, our natural instinct is to ask "What's in it for me?", but what we really need to know is "what's important to them? What can I do for you?" Pages 2 and 3 will help you figure that out.

When you go into the appointment, you want to remind the referral source why you are there. It can be as simple as:

> "If you recall, when we scheduled this appointment our goal was to ___________________. Do you mind if we sit down first so that I can ask you a few questions and take notes?"

Your next step is to sit and take notes. Ask those important questions from pages 2 and 3 of the Professional Relationship Profile. By working through all of the questions on the profile, you will discover:

- What is important to them?
- What has the history of our relationship with them been --- from their point of view?
- What are their challenges?
- How do they balance their personal and professional life? Who are important people to them? What do they like to do?

Just like you would with a call that comes into the community requesting more information, you are going to ask those really important questions from the form and then *spend time listening* and taking notes. Ask more probing questions to help you get the whole story --- "tell me more", "what else should I know?", "anything else?". Our process of doing professional relationship calls is very different from our competitors because we make the call all about learning about the professional we are calling on and NOT about

what we can do for them. You *will* get that opportunity to present your excellent services, but it's not the main thrust of the initial call.

When you have figured out what their concerns are and what they need, you can start presenting solutions by demonstrating how we are capable of helping. Remember that if this is a NEW relationship, it may take several appointments to establish trust and demonstrate our capability before they are comfortable making a referral to you. For folks that you have a relationship with, they will have a different comfort level with you and will be willing to send business your way. The important thing to remember on this initial call is to *find out what do they need or want*. Remember that it is all about them, not us listing out our services. The opportunity to explain how we can partner will present itself to you at the right time. Be ready for it. Just remember that the call is about them sharing what they do and us spending time listening and discovering.

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For Additional Information:

- Please contact your Regional Director of Sales and Marketing
- Check out these links on E&Me:
- Relationship Profile/Professional – Page 2-3
- Relationship Profile/Professional Page 1 – Journal

RECEIVING A DEPOSIT

Big Picture

An important aspect of advancing the sale is to receive a deposit. Once a potential resident or family member leaves a deposit, no matter how many other communities they visit, they will have an emotional intent or commitment to close with you. How aggressively we work to close those deposits will make all the difference to your community and your individual success.

Our Expectations

As an Executive Director or Community Relations Director it is expected that you will use the ***Priority Reservation Agreement*** (PRA) to secure deposits for apartments in your community and actively work to advance that deposit to a confirmed close. You will help manage and facilitate any necessary training for your team in order for those individuals in a support role to fully understand the process and feel comfortable receiving a deposit.

The Priority Reservation Agreement

This sales tool can be found on E&Me and is designed to be very "user friendly". The document language is very straight-forward and worded so that it assumes the next step, which is a close. Here's how it works:

Once the future resident or family member signs the *Priority Reservation Agreement* they are given the first right of refusal for a specific apartment. So, in the case of another individual touring your community and deciding that they want that particular apartment, you are then obligated to call the signer of the agreement and make them aware of another party's interest. They will have two options. They can either sign for that apartment and take financial possession or they can choose another apartment to put that deposit towards. If a similar apartment is unavailable, they can be put on a waiting list. This all creates a "sense of urgency" with our customer and advances the sale.

The amount of the deposit is normally *$500* and can be paid with a check. At the bottom of the Priority Reservation Agreement is a short list describing the next steps in the move-In process which creates excitement for the future resident or family member. Once you have a signed PRA, make a copy for your customer and you retain the original with payment, which you will deliver to your Business Office Director for processing.

Next Steps

After you or a team member receives a deposit you'll want to secure a time activated next step, which in most cases is a Level of Care Evaluation completed by your Resident Care Director. This must be completed prior to move-in and it must be completed by your nurse, who is the clinical expert at your community.

Driving the Move-In

Now that there has been a Level of Care Evaluation, remember to take every opportunity to begin introducing your team to the future resident. This will allow you to disengage more easily and allow the other members of your team to begin building a relationship. You will continue to advance the sale to a close and you and your team will use the *Move-In Checklist* tool found on E&Me to make sure all steps are completed and ensure that there are no gaps in information. Your community's preparedness to welcome the newest member of their Emeritus family is crucial to the success of the senior. A *New Resident Orientation Checklist* has been added to the bottom of the Move-In Checklist in order to help facilitate a smooth transition for the resident. Please ensure that all managers receive a copy of the *Move-In Checklist.* At Emeritus, it is expected that the Executive Director reviews and signs the Resident Agreement with the new resident and his/her family.

The Sales Toolbox

Occasionally you may need to offer an incentive in order to facilitate the close. Emeritus offers a standardized and approved list of incentives known as the ***Sales Toolbox*** (found on E&Me). These incentives can be offered after serious discovery has taken place and a barrier to closing has been identified. These incentives do not have to be approved at a Regional level before they are utilized and will allow you and your teammates some freedom to act quickly. Only *one incentive can be offered from the Toolbox per resident* and remember to communicate to the Executive Director and Business Office Director if you have used one so the appropriate financial addendums can be completed.

Monitoring Your Deposits on Hand

Being able to accept a deposit by means of the *Priority Reservation Agreement* is a real asset to your ability to close, however it is imperative to continue to actively work to close those individuals who have left a financial commitment to your community. You will need to monitor your deposits on hand two different ways and both of the reports are found on ***You've Got Leads***. One way is by utilizing the *Deposit on Hand Report*. Additionally, the *Daily Stand Up Report* also lists those deposits without a scheduled move-In date. If an individual remains on your deposit list for an extended time you will need to continue building your relationship and using your discovery skills to uncover possible objections to a move-in. Work with your Executive Director and Regional Director of Sales and Marketing to strategize follow up plans for those individuals.

For Additional Information and Support:

Please contact your Regional Director of Sales and Marketing

Check out these links:

- Priority Reservation Agreement
- Move-In Checklist
- New Resident Orientation

- Pre-Qualification Checklist

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For Additional Information and Support:

Please contact your Regional Director of Sales and Marketing

Check out these links:

- Priority Reservation Agreement
- Move-In Checklist
- New Resident Orientation

- Pre-Qualification Checklist

ROLE OF THE CRD

Big Picture

As an Emeritus Community Relations Director (or CRD), you are directly responsible for the growth of your community's occupancy (the number of occupied units/apartments). Towards this end you have been provided with a job description to help clarify expectations, as well as a set of Sales and Marketing Standards that have been proven to facilitate occupancy success.

Our Expectations

It is an Emeritus expectation that you will comply with your job description and meet or exceed the Sales and Marketing Standards to help you achieve sales growth. At times you may be given customized Sales Standards that have been agreed upon by your Executive Director and/or Regional Director of Sales and Marketing depending upon the needs of your community and local senior market.

The Community Relations Job Description

The complete job description for the Community Relations Director can be found on E&Me. Here is a quick recap of your essential job functions:

- Work with community Concierge and other team members to lead the sales effort in the community
- Spend at least 50% of time making sales calls to appropriate referral sources outside of the community. Develop and maintain relationships with these sources.
- Train and coordinate the community's Back Up Team.
- Take inquiry call, give tours and secure deposits.
- Know apartment availability at all times
- Ensure that responses to inquiries are handled properly, timely and with appropriate follow-up.
- Alert appropriate building staff of move-ins, move-outs and apartment changes.
- Understand all state and federal regulations regarding acuity levels and licensure.
- Monitor occupancy trends and conversion ratios. Prepare and submit all required reports in a timely manner.
- Maintain You've Got Leads (YGL) database of leads and referral sources on a daily basis.
- Monitor and evaluate customer satisfaction.

- Assist with development of sales materials.
- Serve as a member of the community marketing team.
- Develop and implement special events and presentations targeted at community education.
- Responsible for ensuring that all employees are providing excellent customer service.
- Ensure compliance with all resident's rights.
- Provide in-service trainings as needed and directed by ED. Ensure all employees attend.
- Follow and communicate company policies and procedures.
- All other duties as assigned.

Sales and Marketing Standards

The full CRD Sales and Marketing Standards are available on E&Me however you may find it helpful to keep in mind a few focus points that can be used to help you strategize a plan for occupancy growth.

- External Sales goals of 10 pre-planned or scheduled calls a week and 5 cold calls
- 50 Follow Up calls a week
- 10 Home Visits a month with your Executive Director and Resident Care Director (a minimum)
- Lead and manage Stand Up and the Safely Somewhere Board
- Responsible for First Impressions
- 1 Lead Bank mailing a month
- Manage and Monitor External/Internal Royal Treatment plans
- Complete one Competitive Analysis a quarter
- Manage various events monthly and quarterly

Conversion Standards

- Inquiry/Tour= 80%. This means that you are striving for 80% of your total inquiries (including walk-ins and scheduled appointments) to come into your community for a tour.
- In Call/Tour=70%. This means that you are striving for 70% of the customers who CALL into your community to come in and tour.
- Follow Up/Close=25%. This means that you will close 25% of the customers that you engage in follow up activities.
- 35% Referral from Professional Sales Sources (approximately1 referral from every 3 sales calls)

Occupancy Goals

Certain strategic Occupancy Goals have been developed that when consistently achieved will contribute to a community's and the company's financial success. With the help of your Executive Director and Department Head Management Teams you will strive to meet or exceed the following goals each month:

- Net 2 – A positive growth of 2 units once all move-ins and move-outs for the month have been counted
- 5.5 Move-Ins – Note that your monthly move-in goal may vary depending on the size of your community, your geographic area, and/or current market variables. Your RDSM and ED will work with you to set the monthly move-in goal if it differs from 5.5 move-ins.
- 100% Occupancy
- No Lost Revenue Days – this goal is for buildings that are at 100% occupancy. No Lost Revenue Days means that in a community that is 100%, when a unit comes open it will be filled that same day so that the census never dips below 100%.

Census Budget

Your community will be responsible for certain budgeted occupancy numbers monthly, quarterly and annually which are decided upon by the regional, divisional and by Seattle office. Specifically, the budget you are concerned with most directly deals with the number of residents and occupied units in your community. Your Executive Director will be responsible for communicating those budgetary numbers to you and will work with you to help ensure you have a firm understanding of your goals. It is your job to help your Executive Director and team meet or exceed those numbers by driving referrals of potential residents to your building and closing those sales either individually and by ensuring your Back Up Team is appropriately trained to do so in your absence.

The Non-Negotiables

There are three non-negotiables as a Community Relations Director. They are:

1. Daily utilization of You've Got Leads,
2. Daily maintenance and active use of the Safely Somewhere Board, and
3. Consistent use of the Inquiry/Connections Forms

- **You've Got Leads (YGL)-** YGL is the database that Emeritus uses to manage leads and referral sources. You will manage and maintain this data base system daily in order to ensure accuracy of sales information by documenting all sales interactions with potential residents/family members, follow-up, Move-Ins, Move-Outs, deposits, track specific referral outreach information to include updates and manage your community's occupancy by utilizing available reports.
- **Safely Somewhere Board (SSB) -** The SSB is a "project" board that identifies 5-10 leads that are going to take some extra effort by your entire team in order to reach the goal of move-in. You will manage and maintain the Board which is used daily at Stand Up with your team. It is an excellent tool to communicate the Emeritus philosophy of Safely Somewhere. Assure appropriate information is gathered, documented and that time activated next steps are assigned and completed so that the sale is advanced or a safe living solution is found for the future resident.
- **Connections Forms-** Connection Forms are the forms that we use at Emeritus to collect data on new inquiries and to follow up with current inquiries that are already in YGL. There are a total of six Connections Forms. Three are for initial inquiries and three are dedicated to follow-up. These forms are found on E&Me and should be utilized with every call. The Community Relations Director will provide the appropriate training and in-servicing to department managers or designated staff.

Average Daily Occupied Units (ADOU/ADU)

To have the most impact on your community's occupancy growth, it's important to understand how the Average Daily Units works with regards to move-ins. As the driving force behind occupancy, your job will be to focus strategically on move-ins that occur prior to the 10th of every month. Your goal is to have 50% of your move-ins for the month in-house by the 10th of that month. The reason for this is simple and relates to revenue generation. Here's an example to help you understand ADU better:

Mrs. Smith moves in on the last day of the month. Her daily rate is $100 per day. That means, for that particular month, we achieved a revenue increase from Mrs. Smith's move-in of $100. (1 day x $100 = $100)

BUT...

If Mrs. Smith moves in on the 5th of the month (assuming a 30-day month) at a daily rate of $100 per day, it actually means a revenue increase from that move-in of $2,600.00 for

the month. (26 days x $100 = $2,600.00)

This is why we encourage at least 50% of all new move-ins for the month to be in house by the 10th. The standard is as follows:

- 50% of move-ins in-house by the 10th
- Another 40% of move-ins in-house by the 20th
- The remaining 10% of move-ins in-house by the last day of the month

Move-Ins at the end of the month might be great to help cover move-outs but the total amount of rent received from these residents has an overall minimal effect.

For Additional Information:

- Please contact your Executive Director or Regional Director of Sales and Marketing
- Check out the following on E&Me:
  - CRD Job Description
  - CRD Sales Standards
  - Sales Tip – ADU Focus
  - Quick Guide – Inquiry Calls
  - Quick Guide – Follow Up Calls
  - Quick Guide – Safely Somewhere Board
  - Marketing Expectation: Using You've Got Leads

ROYAL TREATMENT

Big picture

Royal Treatment is the Emeritus version of the "One Extra" gift, the "Something Special". The concept of Royal Treatment is based upon our understanding of someone on such a personal level that we are able to "surprise and delight" them with a gift that is thoughtful and meaningful to them.

Royal Treatment vs. a nice gesture

Understanding the difference between Royal Treatment and a Nice Gesture will indicate how successful you are at practicing Royal Treatment! Nice Gestures are just that – nice. They are considered customer service and are expected as part of the CRD's job.

Examples of nice gestures:

- A pre-packaged Emeritus gift bag
- An invitation to attend one of our upcoming community events
- An invitation to come have lunch with us
- A hand written thank you note

On the other hand, a Royal Treatment gift is creative, personal and memorable. It has the power to absolutely surprise and delight the person receiving it. It doesn't have to cost a lot of money – it is simply powerful because of the thought that went into it.

Examples of Royal Treatment:

- A welcome sign translated into a tour's native Russian language
- Sketch pad and pastels for a potential resident who has been an artist for years
- Providing a hotel list with numbers/prices and local restaurants for an out-of-town family
- A bag of Sky Bar candy bars for a family member who told you that was their favorite

SETTING THE APPOINTMENT

Big Picture

Emeritus Executive Directors <u>AND</u> Community Relations Directors both participate in professional relationship development with referral sources in the community. Approximately half of a Community Relations Director's efforts are geared towards external sales, or marketing to professional referral sources, while Executive Directors will set aside time each week to complete a couple of sales appointments. The most valuable way that you can spend this time is by conducting one-on-one sales appointments with those referral sources. The first step of an excellent sales appointment is setting the appointment.

Our Expectations

You are responsible for face-to-face sales appointments and drop-by visits. It's important to distinguish between the two.

A sales appointment is a pre-scheduled appointment with the key referral source. At the sales appointment, you will spend your time working through <u>pages 2 and 3 of the Professional Relationship Profile</u> .

A drop-by is exactly what it sounds like. You might do a drop-by to schedule a sales appointment, refresh a referral source's brochures, or to drop off a flyer of an upcoming event. You may or may not get face time with the referral source.

Our Procedures

There are really two steps in setting up a scheduled sales appointment. The first step is your *strategy* and the second is the *actual setting of the appointment*.

Strategy involves figuring out where you should be going. It's very easy for us to set appointments with the folks that we already know and have a relationship with. But if you stop and look at your data, you can get a really clear picture of who is actually referring to you and *how many of those referrals are moving in.* Are you wasting time by going to the same referral source month after month and never getting a referral? What you really need to be doing is focusing our calls on those sources that make great referrals. And a great referral is one that actually moves in.

Start your strategy planning by pulling your **Outreach Management Report** from the Reports tab on You've Got Leads. It will give you three months of data on every referral source in your lead bank. If you scroll to the right, you will see data on how many sales calls you've made, how many referrals you've received, and how many of those referrals actually moved in. In almost every community, we've got referral sources that make great referrals and we have not done any sales calls to them. Imagine how those numbers would grow if we actually had a relationship with them! On the flip side, we have lots of referral sources that we are making tons of sales calls to and we are not getting any business from them. That's an indicator that we are either not asking for their business or that we may need to scale back how often we are visiting them. If you are successfully getting great referrals from sources that you are visiting on a regular basis, then you've discovered a key relationship and you need to keep visiting them. But

that also means that you are ready to take your skill set to the next level by branching out and building that same kind of relationship with other key referral sources. Look at what kind of business you are getting those referrals from. Ask your referral source who they would recommend that you meet with in the community that could benefit from our service.

The second step of setting the call is making that appointment. If you are smiling and dialing, you will not be as successful as your peers who go in person to set the call. Statistically, your success at setting that appointment increases exponentially when you do it in person. Why? You avoid voice mail messages, you and the referral source can time activate the call on your calendars so that nobody accidentally "forgets" the call, and you can figure out who the gatekeepers and other important people are at that particular office. Plus, it gives you an opportunity to start a relationship in person.

Once the call is set, make sure that you time activate a reminder call for the day before. This is just a quick call to remind the person of the appointment.

For Additional Information:

- Please contact your Regional Director of Sales and Marketing
- Check out these links on E&Me:
- Relationship Profile/Professional – Page 2-3
- Relationship Profile/Professional Page 1 – Journal

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There are really two steps in setting up a scheduled sales appointment. The first step is your *strategy* and the second is the *actual setting of the appointment.*

Strategy involves figuring out where you should be going. It's very easy for us to set appointments with the folks that we already know and have a relationship with. But if you stop and look at your data, you can get a really clear picture of who is actually referring to you and *how many of those referrals are moving in.* Are you wasting time by going to the same referral source month after month and never getting a referral? What you really need to be doing is focusing our calls on those sources that make great referrals. And a great referral is one that actually moves in.

Start your strategy planning by pulling your **Outreach Management Report** from the Reports tab on You've Got Leads. It will give you three months of data on every referral source in your lead bank. If you scroll to the right, you will see data on how many sales calls you've made, how many referrals you've received, and how many of those referrals actually moved in. In almost every community, we've got referral sources that make great referrals and we have not done any sales calls to them. Imagine how those numbers would grow if we actually had a relationship with them! On the flip side, we have lots of referral sources that we are making tons of sales calls to and we are not getting any business from them. That's an indicator that we are either not asking for their business or that we may need to scale back how often we are visiting them. If you are successfully getting great referrals from sources that you are visiting on a regular basis, then you've discovered a key relationship and you need to keep visiting them. But

that also means that you are ready to take your skill set to the next level by branching out and building that same kind of relationship with other key referral sources. Look at what kind of business you are getting those referrals from. Ask your referral source who they would recommend that you meet with in the community that could benefit from our service.

The second step of setting the call is making that appointment. If you are smiling and dialing, you will not be as successful as your peers who go in person to set the call. Statistically, your success at setting that appointment increases exponentially when you do it in person. Why? You avoid voice mail messages, you and the referral source can time activate the call on your calendars so that nobody accidentally "forgets" the call, and you can figure out who the gatekeepers and other important people are at that particular office. Plus, it gives you an opportunity to start a relationship in person.

Once the call is set, make sure that you time activate a reminder call for the day before. This is just a quick call to remind the person of the appointment.

For Additional Information:

- Please contact your Regional Director of Sales and Marketing
- Check out these links on E&Me:
- Relationship Profile/Professional – Page 2-3
- Relationship Profile/Professional Page 1 – Journal

VETERANS ADMINISTRATION AID & ATTENDANCE

Introduction

The Veterans Administration Aid and Attendance is a federal program which reimburses veterans, spouses of veterans, or widows of veterans for "out of pocket" medical expenses. In many instances, Senior Living falls into this category. This is an excellent financial solution to offer to new and existing residents.

Policy

Communities may offer the Veterans Administration Aid and Attendance Program to potentially eligible residents according to the process below. Community may NOT charge discounted rent while the resident is waiting for their VA benefits to be paid.

Process

To utilize the Aid and Attendance Program:

1. Determine whether resident may be eligible for VA Aid and Attendance benefits. For detailed information regarding eligibility and obtaining benefits, refer to the Quick Guide - VA Aid and Attendance.

2. After you determine that the resident may be eligible for benefits, introduce the concept and offer to help them apply.

3. Arrange for the resident to pay full rent and level of care during the approval process. NOTE: Approval process may take from two to six months or longer. After approval is granted, the resident will receive approved benefits retroactively from the first of the month following the date of application.

Important

- Community may NOT charge discounted rent while the resident is waiting for their VA benefits to be paid.
- Community may offer other financial solutions to the resident and/or family to help subsidize the cost until the VA benefits are received, including:
  - Friendship Suites
  - Credit Card option- The resident/or family member can utilize a credit card to pay the full rent or help subsidize the cost.
  - Elderlife Financial - Bridge Loan
  - Life Care Funding Group - Sale of a life insurance policy
- Exceptions to this policy will be considered only under extreme circumstances and MUST be approved in ADVANCE by the Senior Vice President of Operations.

Related Links

Quick Guide – The Tour Experience

Quick Guide - VA Aid and Attendance

Veterans VA Aid and Attendance Flyer with General Information

Veterans VA Aid and Attendance Flyer with Photo

Veterans VA Aid and Attendance Benefits Seminar News Release Template

THE MARKETING BUDGET

Big Picture

As a Community Relations Director you will be balancing both the Internal and External Sales and Marketing program for your community. Since there are costs associated with the effort to grow occupancy, you will be presented with a Marketing Budget. Your marketing budget will be monitored on a community level by the Executive Director and regionally by your Regional Director of Sales and Marketing.

Our Expectations

The approved marketing budget will be communicated to you by your Executive Director and it is an Emeritus expectation that you will abide by those predetermined figures by managing your departmental expenses appropriately. In addition, every week you will record all expenditures on a *Spend Down Sheet* which you will deliver to your Executive Director at the time specified by him/her.

Spend Down Sheets

Spend Down Sheets are found on E&Me and are completed by you every week. Your spend down collectively tracks a month's expenditures at a time. Your Executive Director and Business Office Director have access to your budget and will communicate what your allotted budget is for the General Ledger codes that fall under your job description. It is your responsibility to monitor how much you spend and make sure that you stay within those financial guidelines.

Additionally, you will need to keep receipts from purchases (copies for your records, originals taped to a blank sheet of paper and turned into the Business Office Director for reconciliation). Some categories in your budget such as "advertising" are actually fixed amounts determined by Seattle and any additions or adjustments must be initiated regionally and approved both divisionally and by Seattle. Some items are charged to Marketing routinely such as the Community Activity Calendar. Communicate with your Executive Director and Activities Director to ensure you are receiving a suitable quantity of calendars for use in marketing and be on the lookout for the monthly invoice so you can accurately track that expense.

At times you and your Executive Director will request approval for a marketing expense that will exceed your budget. Be prepared with estimated costs or bids for any proposed purchases (you will generally be asked to shop at least three different vendors) and provide information about what you hope to gain from the increased expense. It is up to the discretion of the regional and divisional team to grant approval.

P-Cards

Upon employment as a Community Relations Director with Emeritus, you will be asked to complete paperwork for a ***P-Card***. This card is your work credit card. Review your required purchases with your Executive Director, save your receipts and stay within your budget to remain in good standing.

For Additional Information...

Contact your Executive Director, Business Office Director, Regional Director of Sales & Marketing or Regional Director of Operations.

You can also check out the following links: (Shannon – links?)

- Spend Down Sheet
- PCard Policies and Procedures Manual

THE WILDLY IMPORTANT GOAL (W.I.G.)

Big Picture

As a Community Relations Director, you will be partnering with your Executive Director to strategize a plan for occupancy success each month. A Wildly Important Goal or "**W.I.G**." is a sales building tool that will enable you to narrow down a very broad sales goal into a more manageable monthly sales focus.

Our Expectations

It is an Emeritus expectation, that as a Community Relations Director, you will help write and manage a Wildly Important Goal each month. Your W.I.G. is due to your regional Director of Sales and Marketing by the first of the month and you are expected to monitor and measure its progress throughout the month with your management team at stand-up and individually with your Executive Director.

The Wildly Important Goal

The W.I.G. template can be found on E&Me and is designed to take what could potentially be a very general sales goal and narrow it down to a very specific and actionable goal. The objective is to work with your Executive Director and decide on a sales focus that will have the greatest impact on your community's occupancy for the month. You may find that you need to revisit a W.I.G. goal for consecutive months or sometime throughout the year with minor changes to your action plan or recognized barriers.

W.I.G. Example

Let's say for the sake of our sample W.I.G. that your "broad" sales goal for the month is to increase your move-ins. Start by listing a few of the potential things that could increase your closing ratio, such as:

- Increase referrals
- Increase follow up
- Phone blitz
- Training
- Spruce up the appearance of the building
- Increase closes from tours

The list is designed to generate ideas but you can recognize that it could quickly become overwhelming, so start by selecting one idea that could seriously impact your move-ins. Let's choose your Tour to Close ratio (found on *You've Got Leads*) since those folks have already taken the first big step of visiting your community and are more likely to

close. Next, ask yourself what your current move-in average per month is...let's say it's five (5) and you'd like to add two more closes a month. Now think about what specifically you're going to have to do to achieve that increase of an extra two closes. Your current Tour to Close ratio is 25% and on average you tour 20 folks a month. What if you increased that ratio to 35%? Let's look at the math...

20 Tours x 25% (tour/close) = 5 move-ins

20 Tours x 35% (tour/close) = 7 move-ins...increase of two closes...

So your specific goal is going to be to:

***Increase your Tour to Close ratio from the current 25% to 35% resulting in an additional two move-ins per month*!**

Now fill in the details of your Wildly Important Goal. What specifically is needed to achieve this goal? It may look like this:

- In-service back up team on completing the *Connections forms* in their entirety
- Utilize *Follow up toTour Connections form* within 24 hrs of all initial tours
- Retrain team on *Royal Treatment* plan for building
- Spruce up the *Model/Family Room* to make it more appealing and comfortable to potential residents and their family members
- Phone Blitz people who have toured your community within the last 90 days

Next, list any barriers to occupancy and potential solutions. This is a great time to partner with your Executive Director for added support. Make sure you specify who is responsible for any solutions and time activate a completion date. Finally, record your current unit occupancy and your desired occupancy goal. This helps everyone stay focused during the month.

The most important thing to remember with a Wildly Important Goal is that it's not an exercise for just one individual. Partner with your Executive Director to strategize on a specific goal and then remember to communicate that goal to the entire team. They can't support a goal they know nothing about! Track your progress throughout the month (Stand Up is a great time to do this) and consistently use the W.I.G. each month.

For additional information:

- Please Contact your Executive Director or Regional Director of Sales and Marketing
- Check out these links on E&Me:
    - W.I.G. Template
    - W.I.G. Sample

TOUR EXPERIENCE

Big picture

The tour experience is one of the most critical steps of the sales process. A great experience will almost always guarantee you a commitment to move in, while a poor experience means that you are going to have to go through several more steps before you get that commitment.

Our Standards & Process

Our standards for excellent tour experiences include the following:

1. Preparation

- Always go to the model apartment. You have to have a quiet space where you can really listen to what the customer's needs and desires are.
- BEFORE the tour arrives, make sure that you have addressed the following factors in your model apartment and your community:
  - What will the customer hear/not hear? Don't put a phone in the model! Turn off your cell phone.
  - What will the customer see/not see? Is your model clean? What's in the line of sight when you sit in all the chairs?
  - What will the customer smell/not smell?
  - What will the customer taste/not taste? Will you have food? Is it fresh?
  - What will the customer feel/not feel? Is the temperature appropriate?
- Use the Connections form. Even if you already used it during the initial inquiry call, keep using it to discover even more information.

2. Personalize the tour

- Use the customer's name
- Personalize the services to their needs.
- Talk about and point out benefits.
- Avoid referring to "our residents". Remember – this is about the customer!
- Help your customer visualize.
- Connect them with the right associates – based on their needs.
- Vary the route. Take them to see the things that are important to them.

3. Return to the Model and Close

- Return to the model apartment
- Review pricing
- Ask them what questions they have. Listen to what they have to say.
- Ask them their impressions of the community
- Reinforce the positives: "Which aspect of our services do you think will have the most impact?"
- Close by solidifying the move-in and/or time activating the next step.

For More Information...

- Check out the Quick Guide -The Tour Experience, located in the E&Me library.
- Consult your RDSM for additional practice and training on the *Connections* forms.

UNDERSTANDING YOUR COMMUNITY & SERVICES

Big Picture

Assisted Living communities are very similar in that they all provide assistance with activities of daily living and most offer similar programming and services. As the Community Relations Director, it is up to you to understand what makes your community unique, as well as to be well-versed in state regulations, your individual programs, and the backgrounds and strengths of the community department heads.

Assisted Living Regulation

Assisted living communities are licensed by the states in which they operate. There is talk of federal regulation, but at this point, that regulation does not exist. However, the state regulations regarding assisted living must be adhered to and as the Community Relations Director, you do have a responsibility to be aware of your state's specific regulations.

The reason for this is that almost all states have specific regulations regarding:

- Who is considered an appropriate admission,
- Marketing regulations (example: in some states you must include your assisted living license number on all collateral material. Some states even make you spell out the words "assisted living license number" instead of just "AL#".)

Remember, the state regulations provide for the MINIMUM expectation of what is to be adhered to in each community. At Emeritus, it is an accepted best practice that each community strives to achieve even more than the minimum that the state requires. For example, if a state requires a staffing ratio of 1 staff member to every 10 Alzheimer's residents, Emeritus will strive to staff at a higher ratio – maybe 2-3 staff members for every 10 Alzheimer's residents.

Your state will check to see if your community is in compliance with the minimum state regulations by performing a "state survey". Surveys are generally held once per year, but may be held more or less often depending on the state you are in. State surveys are unannounced and when they occur, it is expected that all department head managers will be available to provide support documentation and sit for interviews with the state surveyor. As the CRD, you will most likely be expected to provide samples of your collateral materials.

In addition to the regular state survey that will occur at your community, a state surveyor may also come in at any time to initiate a "complaint survey". This is just what it sounds like – the state agency has received a complaint about your community and they are required to investigate that complaint immediately (usually within 24 hours of the complaint.) In most states, a complaint survey can develop into a full state survey – it is up to the judgment of the surveyor if he/she wants to expand the survey.

Once the survey is completed, the surveyor will meet with your Executive Director to discuss any deficiencies that they have uncovered. If there are deficiencies, your community will receive a "tag" or citation for each deficiency that is indicated. The

community will then have a set amount of time (generally 30 days) to write a Plan of Correction (POC) to address the citation and fix it. Depending on the severity of the citation and if it is a "repeat violation" the state may choose to assess fines. Most often, fines accumulate at a daily basis until the violation is corrected and can be incredibly costly to a community.

Consult with your Executive Director and Resident Care Director to get a copy of your state regulations and then spend some time familiarizing yourself with those regulations. You will be much more successful if you have a solid understanding of what you can and cannot do/provide in assisted living in your state.

Who is our Ideal Resident?

This is going to depend on your state regulations, your community's available services, and the type of licensure that your community has. For example, in Florida, assisted livings are licensed in 3 different ways – depending on which license your community has, you may or may not be able to accept an insulin-dependent diabetic.

Understanding your state regulations and working closely with your Executive Director and Resident Care Director will help you to gain a better understanding of future residents who are appropriate for assisted living.

What Does Your Community Offer?

One of the best ways to gain a better understanding of what your community offers is to print out the Community Fact Sheet from E&Me. Once you have printed it, go and find out the answers and fill it in. Talk with your other department head managers – spend time finding out what their typical day is like, what they do, what their challenges are, what they love about their job. You will learn a great deal and will start learning your community that much faster.

For More Information...

- Consult your Executive Director, Resident Care Director or Regional Director of Sales & Marketing for a better understanding of your state's regulations.
- Fill out the Community Fact Sheet on E&Me.
- Check out the American Health Care Association website at www.ahcancal.org

USING YOUR SALES DASHBOARD REPORT

Big picture

Emeritus provides Executive Directors and Community Relations Directors with a snapshot of sales activity in a format called the "Sales Dashboard". This useful report includes easy to read graphs of community-specific data on the following for the 12 months prior to the report being run:

- Average Daily Units
- Average Resident Move-In Move-Out
- Memory Care Average Daily Units
- Inquiries, Tours & Deposits
- A Place for Mom Referrals
- Internet Leads
- Professional Referrals
- Family & Friend Referrals
- Inquiry / Tour Conversions
- Tour / Deposit Conversions
- Tour / Move In Conversions
- Home Visits

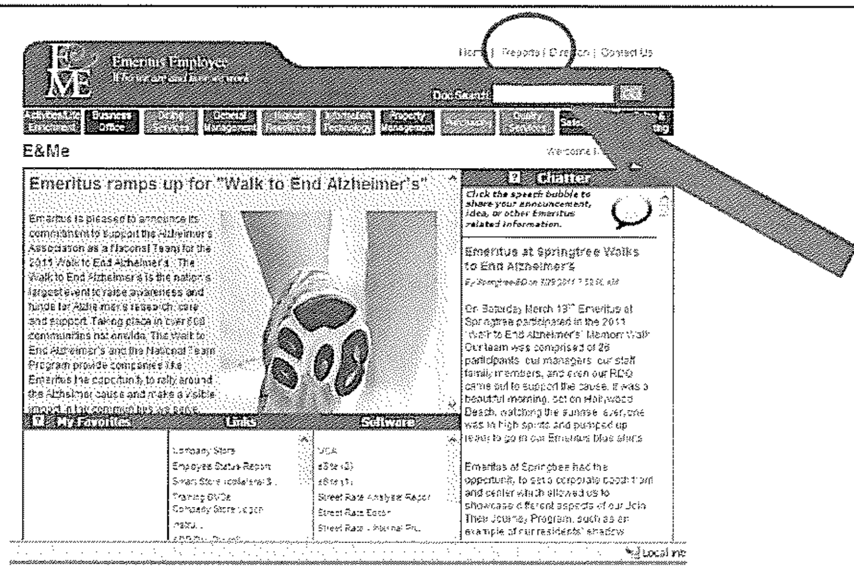
This report is usually available by the 11th or 12th of each month.

Our expectations

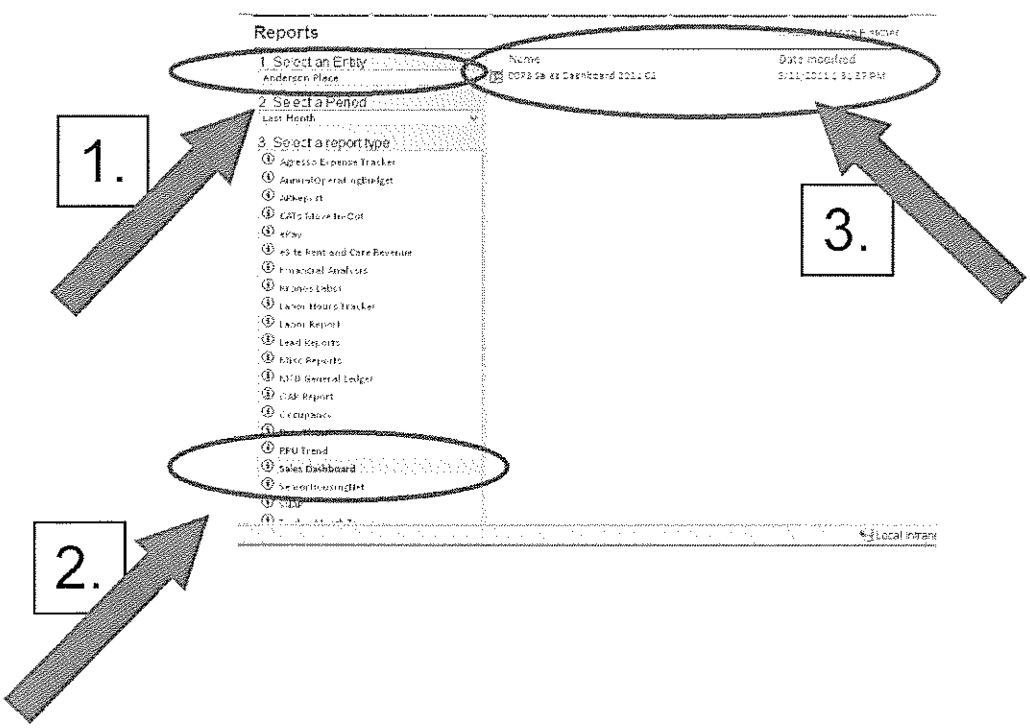
Emeritus expects that Executive Directors are looking at this report monthly along with their Community Relations Directors to analyze activity and to plan their next sales strategies so that they are targeting areas that need improvement. This is also an ideal time to involve your Regional Director of Sales & Marketing in helping to formulate your plan.

Our Process

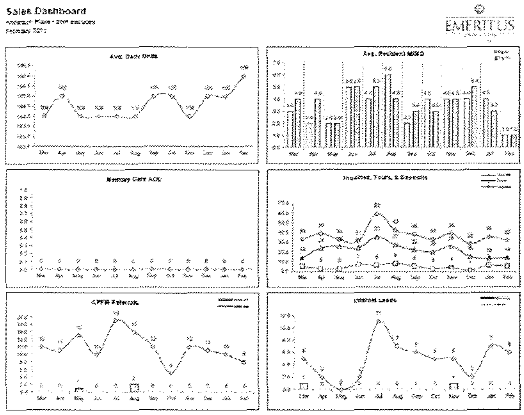
Sales Dashboard reports are located on e&Me. You can find yours by going to the homepage of e&Me and clicking on "Reports" in the upper right corner.



The next screen will allow you to first choose your community, then the Sales Dashboard, and then click on the Sales Dashboard report:



Once your report opens, this is what you will see:



For More Information...

- Consult your RDSM for help with accessing and analyzing this report.

USING 'YOU'VE GOT LEADS'

Big Picture

You've Got Leads (YGL) is the comprehensive database that Emeritus uses to track all prospective leads, referral sources, sales activities and tasks, and current resident care log. It includes a number of reports to help with your strategy planning and time management. It is a web-based resource, so it can be accessed from any computer with an internet connection.

Our Standards & Process

Community Relations Directors are expected to be using YGL on a daily basis. Occupancy reports are generated from this program, so all data must be current on a daily basis. Executive Directors are expected to use YGL on a weekly basis at a minimum.

In order to gain access to YGL, you will need a user name and password. This can be requested from your Regional Director of Sales & Marketing.

Learning the Database

YGL offers "***Basic Training for New YGL Users***" three times each week. You can access this training at any time. Emeritus requires that all initial users take this training and that those who have been using the system take frequent "refreshers". Trainings are currently offered at the following times:

Tuesday, Wednesday and Friday

10am – 12pm Pacific Standard Time (1pm – 3pm Eastern Standard Time)

You must pre-register for the class by sending an email to: help@aplaceformom.com. Include your name, the name of our company (Emeritus Senior Living) and identify the date of the session you wish to attend in the body of the email.

Additionally, YGL offers "***Dynamic Control of YGL – Reports and Administrative Features***" for advanced users of the program. This training is offered on the first and third Thursday of each month, from 10am – 11am PST (1pm – 2pm EST). You must pre-register for the class by sending an email to:

help@aplaceformom.com. Type "Dynamic Control" in the subject line and include your name, the name of our company (Emeritus Senior Living) and identify the date of the session you wish to attend in the body of the email.

For More Information...

Consult your RDSM for additional information about YGL.

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Process

To utilize the Aid and Attendance Program:

1. Determine whether resident may be eligible for VA Aid and Attendance benefits. For detailed information regarding eligibility and obtaining benefits, refer to the Quick Guide - VA Aid and Attendance.

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    - Life Care Funding Group - Sale of a life insurance policy
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Related Links

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